DOCUMENT RESUME

ED 224 120 EA 015 206

AUTHOR	Jongeward, Ray
TITLE	The Educational Management Team: A Communication and Decision-Making Group. A Manual for Workshop Leaders. Keys to School Boardsmanship. A Program of Continuing Education for School Board Members.
INSTITUTION	Montana School Boards Association, Helena.; National School Boards Association, Washington, D.C.; Northwest Regional Educational Lab., Portland, Oreg.; Washington State School Directors Association, Olympia.
SPONS AGENCY	National Inst. of Education (ED), Washington, DC.
PUB DATE	82
CONTRACT	400-80-0105
NOTE	182p.; For related documents, see EA 015 201-212. Also contributing to the development of this document were the Idaho School Boards Association, the Oregon School Boards Association, and the Association of Alaska School Boards.
AVAILABLE FROM	Publications, National School Boards Association, 1055 Thomas Jefferson Street, N.W., Washington, DC 20007.
PUB TYPE	Guides - General (050) -- Audiovisual Materials (100)
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	*Board Administrator Relationship; *Board of Education Role; Boards of Education; *Educational Administration; Elementary Secondary Education; Leaders Guides; *Management Development; *Management Teams; Program Administration; Program Development; Program Evaluation; Program Implementation; *Workshops
IDENTIFIERS	*Board of Education Members

ABSTRACT

The materials in this manual are designed to help workshop leaders prepare for and present three workshops for school board members on the management team concept, the initiation of the management team, and the evaluation of the management team in operation. The manual consists of six sections: an introduction; three sections on planning, presenting, and evaluating the workshops; a selection of resource materials; and a booklet for participants in each of the workshops. The discussion of planning contains information on the focus and scope of each workshop, the grouping of participants, an overview of workshop presentation, and familiarization with relevant resource materials and equipment. The presentation section includes sequential descriptions of workshop activities in each of the three areas, leader focuses for each activity, and instructions for conducting the activities. The resource materials provided include three papers on the management team concept as well as masters from which transparencies for projection at the workshops can be reproduced. (Author/PGD)

ED224120

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

X This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official NIE position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL IN MICROFICHE ONLY HAS BEEN GRANTED BY

M. Margaret Rogers

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

EA 015 206

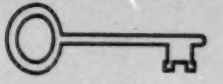
These materials have been produced as part of "Keys to School Boardsmanship," a project to develop new materials in boardsmanship education for local school board members. It is a joint effort among:

- The Association of Alaska School Boards
- The Idaho School Boards Association
- The Montana School Boards Association
- The Oregon School Boards Association
- The Washington State School Directors' Association
- The National School Boards Association
- The Northwest Regional Educational Laboratory

Copyright © 1982 by the Northwest Regional Educational Laboratory. Rights to publication are held by exclusive agreement by the National School Boards Association. Copying or duplication by any means (print, electronic, etc.) is prohibited, except by written authorization by the National School Boards Association.

These works were developed under Contract #400-80-0105 with the National Institute of Education, United States Department of Education. However, the content does not necessarily reflect the position or policy of that agency, and no official endorsement of these materials should be inferred.

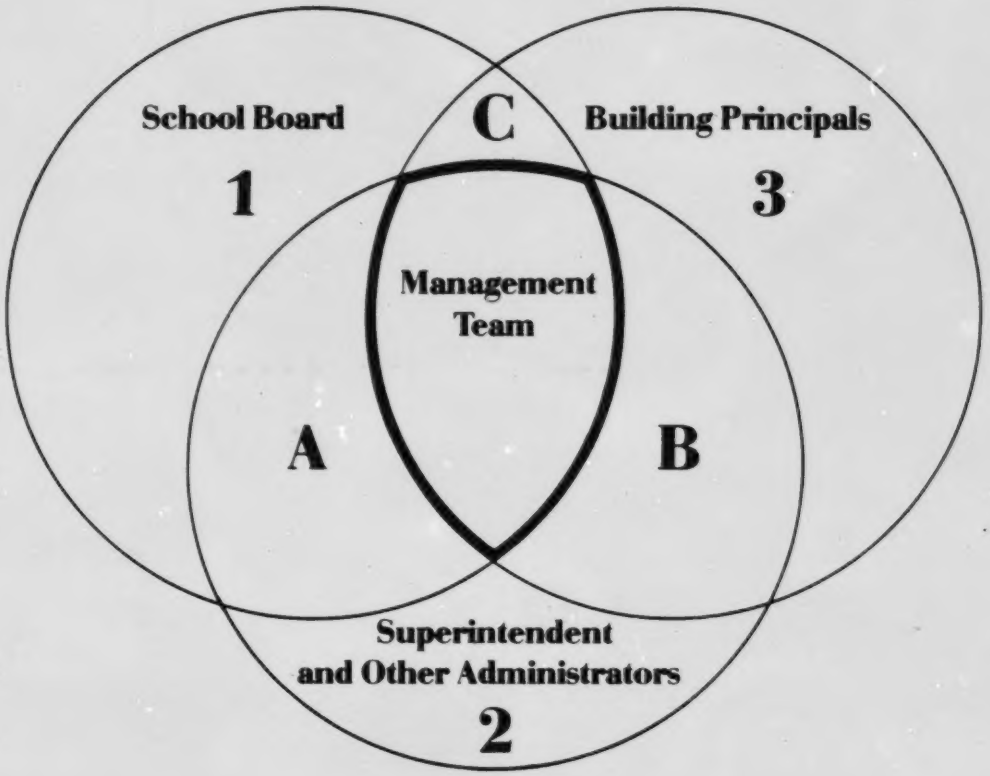
KEYS TO SCHOOL BOARDSMANSHIP



Northwest Regional Educational Laboratory

THE EDUCATIONAL MANAGEMENT TEAM

A Communication and Decision-Making Group



A Manual for Workshop Leaders

Developed by Ray Jongeward, Ed. D.

Northwest Regional Educational Laboratory

KEYS TO SCHOOL BOARDSMANSHIP

Prologue:

This manual is one in a series of thirteen developed by the Northwest Regional Educational Laboratory (NWREL) as part of the "Keys to School Boardsmanship" project.

The workshop programs resulting from the project are intended to help strengthen local school boards through continuing education.

The workshops in the series have been thoroughly tested by NWREL staff and by the staff of state school board associations in Alaska, Idaho, Montana, Oregon and Washington. These programs have been found to be extremely useful as tools for strengthening continuing education services to school board members.

The "Keys to School Boardsmanship" materials are now being published and distributed by the National School Boards Association (NSBA). In addition, the NSBA is developing a national center designed to assist state associations to make the best use of the material.

Thirteen manuals in the series now available from NSBA include:

- Board/Administrator Relations
- Building Bridges: School Board Political Roles
- Communicating with the Community
- Conflict: Alternatives to Blowing a Fuse
- Effective School Board Meetings
- The Educational Management Team
- Policy Development
- Policy is Power
- Program Evaluation: School Board Roles
- What Do School Boards Do?
- School Board Self-Assessment
- School Improvement: A Tune the School Board Can Play
- Teamwork: The Board and Superintendent in Action

MANAGEMENT TEAM WORKSHOPS

SECTION 1: INTRODUCTION

The materials in this manual have been developed to assist workshop leaders plan and conduct three different workshops on the educational management team. They are:

1. An Introduction and Orientation to the Management Team
2. How to Initiate a Management Team
3. How to Evaluate a Management Team in Operation

Purpose and Rationale

The leadership role school board members choose represents a broad continuum. Some expect the superintendent to assume full responsibility and authority for the school district. Others want all management members to participate together as a team. With the recent trend of board members wanting to become more active and accountable for their actions, there has been an increased interest in team management.

These three workshops are intended to satisfy three levels of interest that school board members express in team management. The first workshop is one of introduction and orientation: What is team management, its benefits and problems, how does it work, who is involved, etc.

The second workshop helps a district design and start a management team for itself. The third workshop helps board members assess how well an operating management team is working.

Goals and Objectives

The goal of the first workshop is to introduce participants to the concept of team management using recent research theory and successful practice. The broad objective is to provide participants with sufficient information and involvement in a two-hour workshop so that a decision could be made by a board to (1) continue investigating the concept of team management, (2) agree to adopt it for themselves or (3) reject it as not appropriate at this time. This objective is achieved by:

- Providing a definition of management and describing its functions
- Reviewing five management styles found in school districts
- Proposing basic assumptions about shared decision making
- Focusing attention on management models and helping participants identify the one used in their own district

- Examining the organization, characteristics, benefits and problems of an educational management team
- Reviewing recent research that supports the concept of a management team
- Looking at steps necessary for implementing a management team
- Identifying forces presently operating within their district that would help or hinder adopting the management team concept

The purpose of the second Management Team workshop is to assist members of a school district to plan and custom design a management team that is appropriate for their own district.

Objectives of this two-day workshop include:

- Developing a written management plan
- Drafting school board goals for the management team
- Clarifying role expectations for each participating group
- Writing a statement of purpose
- Designing a team management model
- Examining a process for renegotiating roles
- Developing a set of working agreements
- Suggesting a list of topics appropriate for the management team and an agenda for the first meeting
- Proposing signs of success for judging progress
- Making a list of future training needs

The third workshop has as its purpose to assist a school district to plan and implement an effective evaluative procedure to assess its own presently operating management team.

Objectives for this workshop include:

- To get a local district to utilize an outside facilitator in order to enhance objectivity and validity of results
- To develop a plan which takes into account the uniquenesses of the district

- To provide maximum involvement of district personnel in the assessment plan

- To help the district obtain and utilize reliable survey data to determine the effectiveness of the management team in order to set realistic goals for the future

Scope and Coverage

The introduction and orientation workshop is approximately two hours in length and is intended to be of an awareness level of information. It is suitable for use at regional or state level meetings where members of many boards meet together. Group size may vary from a small number to a very large group of 100 or more depending upon amount of materials available.

The other two workshops are designed for use with individual school districts. Ideally, all members who are considered to belong to the management team would participate, e.g., school board members, central office administrators, building principals and vice principals.

Approach of the Workshops

The first workshop, the introduction and orientation, is primarily informational. The materials used are at the awareness level with some interactive procedures that focus the information on the local district and help break up the flow of presenting more information.

The How To Initiate a Management Team workshop focuses directly on the basic components of management teams, adapting them to the uniqueness of the district and the local wishes of the participants. The materials provided are expected to be modified and adapted to local needs and desires. Specific district problems and issues will form the basis for designing the new management team.

The third workshop on evaluating an existing school district management team is designed so that it may be used by a small representative committee or involve everyone considered to be members of the team. Four survey instruments are provided from which to select the one most appropriate for the school district. The procedures that may be employed for using the survey instrument are similar but again can be adjusted to meet local requirements. A quick method could be used by which paper and pencil responses were sought in order to obtain a general idea of how the management team was working. A much more extensive process would use the survey instrument and a series of small group and team meetings to develop the information desired.

Uses

The primary use of the introductory workshop is for school board members in small or large groups. Group size will be limited by participants' ability to clearly view the transparencies used. Other uses are also possible. Groups of professional educators, such as superintendents, central office administrators, building principals and vice principals, can also profitably participate in this informational workshop.

The use of the other two workshops which help districts implement or evaluate a management team is limited to one district at a time. Assistance is tailored to each district's requirements and is of a more "technical" type of help. Group size will be relatively small, being dependent upon size and the extent of participation desired by others in the district, such as building principals, vice principals and other administrators and supervisors.

Organization of Leader's Guide

In addition to the introductory section, this manual contains five other sections. All of these have been carefully prepared to assist you as leader in planning and conducting these three workshops on the management team. The remaining sections are as follows:

Section 2: Planning the Workshops

This section contains information about preparations the leader needs to make before presenting the workshop. Included are hints and suggestions about:

- Background reading
- Physical arrangements to make
- Groupings of participants
- Materials preparation
- Equipment needed

Section 3: Presenting the Workshops

This section includes a step by step description of workshop procedures, along with time allocations and required resources. Here, you will find:

- A sequence of workshop activities
- Specific instructions and references to participant materials and audio and visual aids
- A leader focus for each workshop activity
- Helpful hints about workshop activities

Section 4: Evaluating the Workshops

In this section, you will find information about various approaches to evaluation of the workshops. Included are:

- o A rationale for getting feedback about the workshops
- o A sample workshop evaluation form
- o A discussion of alternatives

Section 5: Resources

This section contains reading material which the leader will need to be familiar with before presenting the workshops. Included in this section are:

- o Concept papers
- o "Theory" papers
- o Further explanation of ideas developed in the workshops

Section 6: Participant Booklet

This section contains a participant booklet for each of the three workshops.

Much of the success of your workshops will depend upon your study and use of these materials. They were specifically developed to help you plan and conduct a successful workshop. Please use them.

SECTION 2: PLANNING THE WORKSHOP

To the Leader: This manual contains complete plans for three workshops on the management team topic. They are of two different types. The first is a general introduction and orientation type of workshop suitable for regional or state groups of school board members. The second type consists of two workshops that could be classified as "technical assistance" and are directed at personnel from one school district. The workshop entitled How to Initiate a Management Team is a good follow-up workshop after the introductory one has been presented. The third workshop is also of a "technical assistance" type since it deals with personnel from only one school district. It is entitled How to Evaluate a Management Team in Operation. These three workshops inform board members about team management, help them implement a management team and evaluate one already in operation.

The Introduction and Orientation to Team Management

Background: One could easily become lost in the abundant literature on the subject of management. Our libraries and computer banks are filled with titles, essays and other writings that display widely differing viewpoints on this topic. The purpose of this workshop is not to enter into disputes about these different points of view but to identify that many management styles do exist—among them team management.

An orientation-type workshop is frought with the problem of one-way communication. To offset this tendency and get participants actively involved, exercises are interspersed with information.

To open the workshop, a situation is presented. It belongs to someone else and is their problem. Participants are asked to begin diagnosing the neighboring school district's situation. Immediately following this initial and brief observation, information about management is given, i.e., definition, functions, styles and assumptions about shared decision making.

After this input participants are asked to re-examine the situation to see if new insights have occurred or if they wish to modify their original diagnosis. Next, an exercise engages workshop participants in (1) examining the existing school district organization and management style and (2) how they would like it to be. The concept of the management team is presented showing its characteristics, benefits and problems. Some recent research is shown briefly that offers reasons why a management team structure in school districts may be needed.

In concluding the workshop, specific steps that are needed to begin implementing the management team concept are given. The last activity asks participants to complete a list on the positive and negative forces presently operating that would help or hinder the establishment of a management team within their school district.

The research citation of "Domain Theory" has the potential for opening up a discussion of its own. Many lengthy and heated arguments have occurred over the application or adoption of the business-industrial model for education. The research paper on Domain Theory found in Section 5 treats this question in more detail. However, for this introductory workshop the research excerpts used are primarily for the purpose of (1) introducing the concept of "loose coupling" for a clearer understanding of school district management, (2) helping both board members and administrators realize and accept as healthy how different they are, and (3) seeing how the concept of the management team offers hope for bridging differences by using it as a mechanism for communication and decision making.

The conclusion of the workshop is to:

- Provide participants who want to continue exploring team management with specific steps that can be taken

- Examine the positive and negative forces presently operating that may help or hinder establishing the concept of a management team in their district

Finally, if, in your state, the school board association (perhaps in cooperation with the superintendents' and principals' associations) has issued a statement or policy on team management, it could also be cited or explained at the conclusion of the workshop.

This brief review of the strategy of the workshop is intended to alert you as leader to two factors: (1) A heavily informational workshop can turn into a dull and boring lecture unless the leader is well prepared, and (2) The leader will need to spend time studying these materials in order that both informational and interactive objectives can be achieved.

The time required for this workshop is 2 hours, 15 minutes to 2 hours, 45 minutes. See the sample agenda below.

The Agenda for this workshop includes:

Activity 1	10 minutes	Opening, local arrangements, workshop overview, warm-up activity
Activity 2	15 minutes	A Situation: The School District Next Door
Activity 3	10 minutes	Lecturette: What is Management? Its elements, functions, and styles
Activity 4	10-15 minutes	Assumptions About Shared Decision Making
Activity 5	10 minutes	Re-examine situation
Activity 6	30-40 minutes	An exercise on management models
Activity 7	15 minutes	Types of management teams, their characteristics, benefits and problems
Activity 8	15-20 minutes	Why Use Team Management--some research and theory--A Lecturette
Activity 9	5-10 minutes	Steps to implement a management team
Activity 10	5-10 minutes	Analyzing forces within your own district
Activity 11	5 minutes	An example of local school board policy
Activity 12	5 minutes	Workshop summary and evaluation
	135-165 minutes	

There are specific objectives to achieve as outlined in Section 1 and again in Section 3. (The papers found in Section 5 also provide important information and should become familiar to the leader.

The three papers that provide helpful background for this orientation and introductory workshop are:

- Why a Management Team by Ray E. Jongeward
- The Educational Management Team—Opportunity for Quality and Local Control, a review of recent research by Ray E. Jongeward
- School Management Teams: What Are They and How Do They Work by Lloyd A. DuVall and Kenneth Erickson

Section 3 of this manual provides detailed instructions and procedures for presenting this workshop. You will want to review them carefully as you prepare and plan for this presentation. The format used throughout this section illustrates how the materials and activities are organized:

TIME		MATERIALS
10 min.	Activity 3: Lecturette - Introducing the Management Team Topic Leader Focus: From the abundant literature and varying viewpoints this activity proposes a definition of management and suggests five basic elements of management that are often used to describe how it is done. o Explain that many books have been and continue to be written that attempt to explain and/or promote an understanding of management and organization. o Suggest that different points of view exist among these writers. o A good starting point for this workshop would be to define management and its elements and functions (according to Peter Drucker). o Using Transparency 1 summarize the points shown under "What is Management - Management Elements."	Trans. MT 1
	o Next show Transparency 2: Management Functions, and summarize these points briefly.	Trans. MT 2

Note that each of the 12 activities in this workshop are placed between solid lines to help identify when they begin and end.

In addition to the workshop activities as illustrated above, there is also a participant booklet. These materials are keyed to an activity or procedure in the workshop outline--usually found in the right hand column under "Materials." All instructions for using these participant materials are found in Section 3 of this manual.

Physical Arrangements

Often much of the success of a workshop can be attributed to good physical arrangements. As leader you can control how these are made and you need to do so.

For this workshop participants will need space to write in their booklets as well as view the transparencies. The presentation varies from the group as a whole to individuals interacting with another person or a small group.

Arrange participants in small groups of five to eight people--preferably around round tables. This makes it easier for them to become acquainted and to hear and interact with one another. It also allows you as leader to circulate among the small groups to answer questions and keep them on task.

Grouping Participants

Give some thought to this issue. Typically, two kinds of groupings of participants are possible in a workshop.

- Stranger groups, made up of individuals who do not know one another well, for example, school board members from different school districts.
- Home groups, made up of people who are quite familiar with one another, because they work together or socialize often. School board members from the same district are an example.

Stranger groups are created simply by directing participants to sit with people from other districts as they enter the room. There are advantages to establishing such groupings, including:

- A sharing of a variety of experiences, ideas and perspectives
- Development of a broader perspective about problems, issues and solutions
- An avoidance of tensions, problems and differences which may be present in a home group

In establishing stranger groups, care should be taken to allow individuals to get acquainted with one another early in the workshop. You might ask people at each table to introduce themselves, and give some information about their district, their schools or other matters.

Another alternative is to establish home groups for the workshop. Home groups have several advantages, too:

- They may make direct use of the workshop to develop plans or ideas they want to put to use.
- Since they are already familiar with one another, they need no time to get acquainted.
- They have established patterns of discussion and interaction.

Your use of home or stranger groups will depend on your overall objectives and upon what you know about the workshop participants.

In either case, you should plan to monitor the group progress regularly during the workshop to ensure full participation and task-related behavior.

Preparation of Workshop Materials

As part of your planning for the workshop, you will need to be certain that you have enough booklets for all participants.

In addition, it is helpful to organize your own materials (notes, transparencies, workshop procedures) in the sequence you plan to follow.

Equipment

This workshop requires the use of an overhead projector and screen (or blank wall) for projection.

Check the projector in advance to ensure that it is in good operating order. It is a good idea to have a spare projector bulb close at hand in case of malfunction.

Opening and Closing the Workshop

The "rule of thumb" technique used to prepare a speech is also very applicable in workshop presentations: "Tell them what you plan to present. Present it. Tell them what you presented."

The opening of a workshop needs to be planned to begin on time, dispense quickly with essential preliminaries and focus the participants' attention on the topic. Much of the expectation for a workshop is set in the first few minutes and is difficult to alter thereafter. This workshop alternates between information giving and participants' interacting. The proposed design demonstrates these expectations within the first ten minutes.

Equally important is workshop closure. Good teaching emphasizes application of information learned or obtained. Reserve time at the conclusion of the workshop to summarize what the workshop tried to accomplish and, if possible, help participants use this information in some manner by applying it to their "home" situation. In this workshop this is done by using the force-field analysis activity.

Evaluating the Workshop

Another important part of workshop closure is the evaluation activity. Asking participants to recall workshop information and activities tends to "fix" them more firmly in their minds and becomes more readily available for use at a later time. This feedback is also valuable by providing you with ideas and suggestions for improving the workshop the next time you present it. Be sure to include the evaluation activity in your workshop. It's valuable!

In the next two parts of this section information is provided that assists the leader in planning "technical assistance" workshops on (1) How to Initiate a Management Team and (2) How to Evaluate a Management Team in Operation. The initiating workshop is a good follow-up activity to the introductory workshop. These are both targeted on the personnel of one school district.

Planning for the Workshop on How to Initiate a Management Team in Your District

To the Leader: This workshop results in a usable product--a tailor-made model of a management team for a local school district. Materials presented are to be adapted to fit the needs and uniquenesses of the district. The emphasis throughout the workshop is on role definition and clarification, a frequent stumbling block in team management. A process for renegotiating roles is also provided to help members adjust their expectations of one another when necessary.

The remainder of this part is intended to help you consider the important issues and decisions needed to develop your workshop plan.

Goals and Objectives

The purpose of this workshop is to develop a well-tailored management team plan for a local school district. Specific objectives and expected outcomes are found in Sections 1 and 3 of this manual.

Agenda--Flow and Time

This is a two-day workshop that requires considerable work for the participants if the expected outcomes are to be achieved. The agenda provided shows the activities and the amount of time needed for them.

Grouping of Participants

Activities provided in the workshop address the group as a whole as well as small groups. There are times when work groups, e.g., board members, building principals, vice principals, are asked to work together. At other times small mixed work groups are used. Groupings are determined by the nature of the task and the expected outcome.

Physical Arrangements

Ideally this workshop would be held outside of the school district in order to have the complete attention of all participants. At least one room is needed that is large enough to accommodate the total group. It is helpful to have two or three smaller rooms available for break-out groups.

An overhead projector and screen are needed for some of the large group activities; therefore, table and chair arrangements should be planned with this in mind.

Materials Readiness

Unlike the other workshops, materials are better used when they are handed out just prior to an activity. This helps focus and keep the attention of the group on the topic at hand. A folder containing the agenda, scratch paper and evaluation form is also useful.

As leader, you will need to be well organized in order to have the right materials available when needed.

Equipment

An overhead projector and screen are needed to display the transparencies.

Opening and Closing the Workshop

A good focusing activity to begin this workshop is a brief review--using transparencies--of the basic information covered in the introductory workshop. The force-field analysis immediately presents the realities that must be dealt with if the management team is to succeed.

The close of this workshop is highly important since it must be clearly established what agreements have been made, what ones are left undecided, who is responsible for completing unfinished work and the time schedule for next steps.

Evaluation

Written feedback on the workshop will provide valuable data for you as leader to improve this workshop the next time. This opportunity frequently provides clues for district leaders regarding fears and expectations of participants as well as suggestions for agenda topics.

Planning for the Workshop on How to Evaluate a Management Team in Operation

To the Leader: The assumption is made for the use of these materials that an already existing management team is to be evaluated. Several options are available for using these materials:

1. The three survey forms could be mailed to district leaders and they would select the one they liked and proceed to complete the evaluation by themselves using whatever procedures they wanted to use.

2. During a conference with district leaders, one of the survey options is selected and subsequently completed by all management team members. The forms are returned to you for tabulation. You prepare a report that summarizes the results. At a meeting with district personnel you present the report. Discussions would ensue and clarifications made as necessary. It is a reasonably fast process and yields a picture of what the management team looks like at a specific point in history. The comprehensiveness of this report depends to a great extent on which survey option is chosen.

3. A more comprehensive strategy could be used in which the survey form not only would produce the evaluative information but also would actively involve participants in long range activities. This procedure might be desirable if there was a need to increase communication among the groups. It would also be valuable if an important outcome of the evaluation was the development of new goals to which everyone would commit themselves. The process proposed in these materials follows this option very closely.

Obviously there are many variations of these options that could be developed.

The suggested procedure (Activities 1-4) outlines the steps that may be taken to accomplish the evaluation.

SECTION 3: PRESENTING THE WORKSHOP

In this section there are three different workshop designs presented for the management team. The order in which they appear is:

- Introduction and Orientation to Team Management — Page 17
- How to Initiate a Management Team in Your District — Page 40
- Evaluating the Management Team — Page 61

MANAGEMENT TEAM WORKSHOPS

WORKSHOP 1: INTRODUCTION AND ORIENTATION TO TEAM MANAGEMENT

To the Leader: This is one of three workshops on the management team. The purpose of this introductory workshop is to introduce the concept of team management using recent research, theory and successful practice. Other workshops focus on how to initiate a management team in a school district and how to assess an operating management team.

Included in this workshop are the following:

- An activity to focus participants on the topic
- An opportunity to diagnose a school district situation
- A proposed definition of management
- A review of five basic management styles
- Some assumptions about shared decision making
- An examination of the benefits and disadvantages of team management
- Recent research and theory that appears to validate management team concepts
- An examination of what forces are operating in your district that would help or hinder adopting the management team concept
- An opportunity to analyze your district's present management style and how you would like it to be
- Suggested steps needed to implement a management team

Below is the workshop design. Please review it carefully, noting estimated times for activities and the materials needed for each activity. Additional background reading is found in Section 5.

TIME		MATERIALS
Total Time: 2 1/2 hrs.	Workshop 1: Introduction and Orientation to Team Management	
10 min.	Activity 1: Introduction Leader Focus: Participants are introduced to this workshop by a welcome, a warm-up exercise and a statement of purpose and objectives.	

TIME			MATERIALS
3 min.	o	Welcome participants, make needed introductions, inform them concerning local arrangements, and refer them to the Agenda on page 3 of the participant booklet.	Workshop Agenda
5 min.	o	Use the warm-up to help focus participants on topic. — Ask them to think of two or three things that make a person feel part of a team. — Ask them to share these ideas with the group. — Record them on blackboard/newsprint.	Blackboard or Newsprint
2 min.	o	State workshop purpose and objectives by referring participants to their booklet, page 2, and reviewing them together.	Participant Booklet Page 2

Helpful Hint: Recorded responses to the warm-up exercise are useful at points during the workshop. Therefore, save them for reference and use when appropriate.

15 min. **Activity 2: Situation: The School District Next Door**

Leader Focus: This activity serves two purposes:
(1) to engage participants early in the workshop and
(2) to provide a framework for the workshop.

- o Ask participants to turn to page 4 in their booklet. — Participant Booklet Page 4
- o Explain that a fictitious situation will be presented in order to begin the focus on the workshop topic. This situation will be used again during the course of the workshop to help establish basic principles of management and organization.

TIME			MATERIALS
10 min.	o	Ask participants to work individually first and then in pairs to review this situation from a management and organization viewpoint. Have them come to an agreement on what they believe are the major factors that have contributed to this situation. Ask them to jot their ideas down on the space provided below the situation in order to share them with others.	
5 min.	o	Next, ask them to share ideas orally in order that everyone can hear their responses. Do so very briefly. Explain that temporarily they will put these ideas and conclusions aside until some more information has been provided.	

---

10 min. **Activity 3: Lecturette - Introducing the Management Team Topic**

Leader Focus: From the abundant literature and varying viewpoints this activity proposes a definition of management and suggests five basic elements of management that are often used to describe how it works.

- o Explain that many books have been and continue to be written that attempt to explain and/or promote an understanding of management and organization.
- o Suggest that different points of view exist among these writers.
- o A good starting point for this workshop would be to define management, its elements and functions (according to Drucker).
- o Using Transparency MT 1 summarize the points shown under "What is Management - Management Elements." — Trans. MT 1A, Trans. MT 1B
- o Next show Transparency MT 2: Management Functions: POSIE and summarize these points briefly. — Trans. MT 2

TIME	MATERIALS

o Next, suggest that while there are a wide variety of ways to manage these functions, often five broad categories or styles are used to describe how people manage organizations.

Show Transparency MT 3*, exposing one style at a time and using these points to explain each one. — Trans. MT 3

— Model I: Superintendent-Dominated Decision Making

--- Superintendent assumes full responsibility and authority for decision.

--- Like the military, decision is reached and announced by superintendent and expected to be implemented.

--- Consideration may or may not be given to what others will think or feel about the decision.

--- There is little opportunity provided for participation in the process.

--- Example: "We will be hiring Jack Yates as elementary principal next year and he starts July 1."

— Model II: Superintendent-Centered Decision Making

--- Superintendent presents a tentative decision and allows others to exert some influence.

--- Problem has already been identified and diagnosed by superintendent.

--- Some reactions and opinions on its merit are sought.

--- Example: "I feel we should go ahead with the Middle School building program. Any reactions?"

*Adapted from Leadership & Organization: A Behavioral Science Approach. N.Y. McGraw-Hill, Inc. 1961. Robert Tannenbaum, Robert Weschler, and Fred Massaric.

TIME MATERIALS

— Model III: Superintendent-Defined Decision Making

--- Problem is largely defined by superintendent.

--- Ideas are presented and questions encouraged.

--- There is opportunity to explore assumptions and rationale to gain understanding behind superintendent's thinking.

--- Example: "I'm leaning toward adopting the newly published science book. Have any of you had time to review it?"

— Model IV: Team-Dialogue Decision Making

--- A team concept emerges and increases its role and influence in the decision process.

--- The team has opportunity to develop some solutions.

--- The knowledge and expertise of members of the group is used to discuss problem to be solved.

--- Example: "Parents at the high school are beginning to complain about the open campus rules for students. Have you heard any of these complaints? What should we do about them? What is the feeling of the faculty?"

— Model V: Team Decision Making

--- The management team functions as a cohesive work group.

--- Each member participates in identifying, diagnosing, developing alternative solutions and deciding.

--- Each person is viewed as having necessary competence and experience.

--- Superintendent serves as coordinator and/or facilitator.

--- Superintendent often serves as a valuable information resource to team.

--- Superintendent and board delegate a formal authority role to the team and are committed to implement what the team decides.

o Conclude by showing how the superintendent's values, confidence in colleagues, leadership style and tolerance of uncertainty are put to the test if the decision is made to move toward Model V. The following points may be used:

— Superintendent must decide how much risk can be taken in terms of delegation of responsibility.

— Superintendent must decide what role to play in the management team.

— Superintendent must weigh the virtues of efficiency (Model I) with long range effectiveness (Model V).

o Finally, summarize the activity by using such points as the following:

— These five styles represent a continuum.

— Able board members/administrators use a variety of styles at different points and times under various sets of circumstances.

— A district's needs change, demanding different management styles: a strong hand during chaos; in peaceful times more people want "some of the action."

— When a district uses a variety of styles, it means that thought and planning have been done to "sort out" when each style is most appropriately used.

TIME		MATERIALS

— Administrators who know their boards realize that certain management styles will be accepted and be productive while other ones will not. A "fit" is needed.

— Some communities have long traditions that make certain management styles acceptable while others are not (e.g., community involvement).

o Model V is the focus of this workshop. As we begin to examine a shared decision-making style of leadership, we make certain assumptions.

10-15 min. **Activity 4: Assumptions About Shared Decision Making***

Leader Focus: The purpose of this activity is to help participants realize the nature of assumptions that underlie team management. Individual values and beliefs are represented in the list and could cause lengthy and heated discussions. The overall purpose of presenting them is to recognize and become aware of them—not to debate and try to agree at this point.

o Suggest to participants that when decision making is shared the roles of those involved need to be clearly identified.

o This exercise may help them to identify that they may hold different assumptions concerning what shared decision making means.

o Ask participants to turn to page 6 of their booklet and again work in pairs to review these assumptions. — Participants Booklet Page 6

o Conclude this activity by asking participants to react to any of these assumptions. Why do they question certain ones? Are they not important? Are some left out? Would they agree that discussions on these assumptions (and others) would be important prior to deciding whether or not to have a management team?

---

*Adapted from "Some Working Assumptions About Shared Decision Making," Don Hafeman, et al, Wisconsin School News, May 1977.

TIME		MATERIALS
	o Finally, explain that the purpose of this activity was to alert participants to these assumptions and the need for considering them during discussions of a management team.	
10 min.	Activity 5: Re-Examine Situation Leader Focus: This activity serves as a stop-action event in which the input from Activities 3 and 4 may be reviewed and applied to the situation presented in Activity 2.	
3 min.	o Ask participants to refer back to the situation on page 4 of the booklet and working in their groups of four, answer two questions. In view of the information presented in the last two activities would they: — Say anything different now about the situation? — Venture any new understanding, insight or tentative conclusion?	Participant Booklet Page 4
7 min.	o After a few minutes for group interaction, ask for brief (oral) comments from the groups to see how they responded to the two questions. o Conclude by telling the group that until now they have been examining a fictitious situation. The next activity will focus on their own district situation.	

TIME		MATERIALS
30-40 min.	Activity 6: The Management Models Exercise	

Leader Focus: Searching for and finding team management models and adapting them directly to the organization could be a rather simple and easy task. To do so, however, may delay or actually prevent participants from identifying with the new structure or reluctantly "owning" it. The structure of a management team is not a mechanical one. Rather, it is an agreed-upon set of processes and procedures that will be used to solve problems, influence decisions and communicate with one another. Therefore, it is highly desirable that people who are going to use them be involved in the "inventing" and development of them. As is often the case, the invention or structure of the management team may prove to be of lesser value than the involvement experience of designing it. Simply adopting someone else's model denies the uniqueness and individuality of one's own group and community.

The exercise which follows will focus participants' thinking on the processes and procedures of a management team. The strategy, however, is intended to involve all potential management team members in the process of "inventing" their own model based upon the creativity and uniqueness that they possess.

- The activities and materials in this exercise are intended to:
  - Help participants examine the present style of management that exists within their district.
  - Identify how they would like the style of management for their district to become (if they think it should be modified).
  - Share their ideas with others from their own school district.
- Ask participants to:
  - Turn to page 7 of their booklet. — Participant Booklet Page 7
  - Review the various models of management as shown for small, medium and large districts.

TIME		MATERIALS
	o Ask them to work individually or with another person from the same district and diagram in the space provided on page 13 what they agree is the present style of management in their district.	Participant Booklet Page 13 (Top)
	o As leader, circulate among the groups and when most of them have completed their work ask them to continue working in the same small group and diagram (if different) how they would like to see their district organized.	Participant Booklet Page 13 (Bottom)
	o Explain that they will be asked to share their ideas with the total group.	
	o Ask three or four groups to briefly explain what they discussed. Questions the leader may use to stimulate responses include: — Did you gain some insights into your district management style? If so, what are they? — In order to diagram your style of management what kinds of questions did you find yourself answering?	
	o Use Transparency MT 4 to show that there is evidence that team leadership works when: — There is a high need and capacity for freedom and independence. -- There is readiness for the responsibility of tough decision making. — Participants are problem solvers not mere identifiers or reporters of problems. — Members identify with the goals of the system.	Trans. MT 4
	o Summarize this activity by explaining that the purpose of it was to focus on their present district management style and to begin thinking about how it might be. No conclusions were expected.	

TIME MATERIALS

Helpful Hint: The leader while working with the small groups can use questions such as those listed below to stimulate participants to complete this exercise:

What is the preferred leadership style of your board and superintendent?

How many people are to be included or represented in the management team?

Who are they?

How much authority and autonomy are the separate groups expected to have?

How frequent will the management team meet?

What issues, problems or topics will the management team face?

What is the basic purpose and function of the management team?

---

15 min. Activity 7: The Educational Management Team, Its Organization, Characteristics and Benefits

Leader Focus: This activity is a heavy input event by the leader. It gives basic organizational patterns used by school districts employing team management concepts and provides lists of characteristics and benefits that best describe them. Transparencies, participant materials and a lecturette by the leader are all used. The purpose is to give participants a quick and fairly comprehensive view of management teams.

TIME		MATERIALS
o	Using transparencies 5, 6 and 7 show three different patterns of organization for a management team. Points to make include:	
	— All three illustrations show at least three separate teams joined in one way or another.	
	— Transparency MT 5 excludes board members, expecting the superintendent to represent them.	Trans. MT 5
	— Transparency MT 6 uses a "linking pin" idea of the principal and superintendent to represent their groups.	Trans. MT 6
	— Transparency MT 7 shows the three groups as equal partners with the management team as the focal point. Relationships between the board and superintendent at A are seen as both formal and informal, and continuous. At B administrators and principals relate both administratively and professionally with these contacts being both formal and informal, and continuous. Relationships between the board and principals (C) are informal and usually infrequent. (See design on cover.)	Trans. MT 7
	— The management team consists of all three groups or their representatives who meet on schedule for purposes that have been agreed upon.	
o	Ask participants to turn to pages 14-16 of their booklet and individually review the characteristics, objectives, benefits and problems of management teams.	Participant Booklet Page 14 Page 15 Page 16
o	When most people have completed reading these materials, ask if there are questions or clarifications needed for understanding the materials.	

<u>Helpful Hint</u>: Use this material as input and not for purposes of discussion. Answer any questions but move rapidly to the next activity.

TIME		MATERIALS
15-20 min.	Activity 8: Why Use Team Management?	
	Leader Focus: This activity offers the leader an opportunity to address philosophic concerns of participants by citing recent research. The information (found in greater detail in Section 5) describes why it is normal and natural for members of these three groups to often be at odds with one another. To expect everyone to always accept the roles of others and to agree with what they do and say is not being realistic. The case that is made here supports the notion that a neutral ground—the management team—is needed in order that differences can be addressed and agreements can be made that are acceptable to everyone. Each group is seen as an important entity; but together as a management team they become a group with the common goals and objectives of the school district in mind.	
	o Ask participants to turn to page 17 in their booklet.	Participant Booklet Page 17
	o Lecturette: use the following points to further explain this research:	
	o If you have wondered why it is so difficult for groups within a school district to work together in a smooth and cooperative manner, the following research may help provide some reasons and a possible explanation.	
	— Two researchers, Paul Mico and James Kouzes, have recently proposed an interesting concept called "Domain Theory."* (Greater detail is found in Section 5.)	Trans. MT 8A Trans. MT 8B
	— Domain Theory illustrates the relationship of the three school district groups and shows how the management team is formed through their interactions.	
	— The Management Team Domain forms neutral ground for the three groups.	

*Excerpts and rewording of material prepared by James M. Kouzes and Paul R. Mico, entitled "Domain Theory: An Introduction to Organizational Behavior in Human Service Organizations," Journal of Applied Behavioral Sciences, Vol. 15, No. 4, 1979, pp. 456-464.

- It is a place where communication, inquiry and experimentation are developed and nurtured.

- Through their joint actions and interactions, an organizational check and balance system develops.

- Each of the three domains establishes and maintains its own separate identity. Yet, the effectiveness of the school system is dependent upon the extent to which the three domains, working together, can develop shared purposes, arrive at common goals, develop trust and confidence in one another, plan and implement effective strategies and feel that they have had opportunity to influence district policies and decisions.

- The management team itself has an informal structure with few levels of authority, low division of labor and many representatives from the three domains.

- Procedures internally are of a collegial nature using processes such as creative problem solving, constructive confrontation, collaboration and critique.

- Such an approach provides a new communication and decision-making mechanism for discussion and analysis of joint problems and a forum where two-way communication facilitates understanding between and among the three groups.

o Use the following points to help describe the factors that cause the board, administrators and principals to often work against one another. Ask participants to turn to pages 18-19 of their booklet and read about each of these differences. — Participant Booklet Pages 18-19

o As leader, "walk" participants through this material--highlighting parts of each one.

— Separate Identities and Interests

--- Varying environmental demands may cause the three groups to respond in different, even incompatible ways. For example, citizens demanding lower taxes may demand budget cuts while professionals are requesting higher salaries and larger budgets in order to provide newer educational practices.

--- Each group works under its own guiding principles, organizational structure and measures of success and tends to separate and become disconnected from the other groups. They grow apart and tend to establish separate identities.

--- It is quite natural for this to happen since they each use different principles, structures and success measures.

--- What happens is a feeling of disjointedness, looseness—almost a lack of control. Sometimes, maybe quite often, antagonisms between groups arise because of the lack of a common vision of the school district.

— Differing Perceptions

--- Viewing a school district problem through the eyes of a board member often differs from what the administrator sees, and both views may be different from that of the principal.

--- We know that perceptions of a similar event vary. What sometimes happens is that each group selectively collects information that aids its own perception of reality while often ignoring and/or discounting information from other sources.

--- If this process is continued, greater alienation between and among the three groups results. Tension and conflict grows. The school district begins to be torn in several directions because there are differing perceptions of reality.

— Norm Differences

--- The norms of behavior differ among the three groups, e.g., administration expects conformity to rules and procedures; the principal group prizes individuality which often threatens conformity; school board members expect that people will publicly disagree with them and are accustomed to bargaining and negotiating.

--- Thus, behaviors acceptable to one group are often unacceptable to another; separation is strengthened; and the possibility of establishing close working relations is weakened.

— Discordance

--- Within a school district and among the three groups, the potential for tension and conflict is almost always present.

--- The nature of the work causes stress.

--- The lack of harmony is heightened, however, because of the stress between the principles, measures of success, organization and the work styles of each group.

--- The school board, aiming to establish fair and equitable treatment, is often at odds with the administration's cost efficiency and effectiveness measures.

--- These practices, in turn, are frequently in conflict with professional standards of practice, causing frustration among principals.

--- The representative structure of the boards, the bureaucratic processes of administrations and the collegial relationships of principals do not fit neatly together.

--- Required administrative management procedures are often at odds with human treatment processes of the profession. Neither are compatible with the board's negotiating and bargaining strategies.

— Struggles for Power and Control

--- Unlike managers in business and industry, superintendents do not have the same degree of control. Principals, who feel well trained, demand much more autonomy and self-regulation, and prize creativity. Professional association standards tend to establish regulations to govern the behavior of their members.

--- Each group then struggles to maintain its own integrity and to balance the power of the others in the school district. Teamwork often suffers.

--- Collaborating toward a common purpose is sometimes lost to a struggle for power and control of the district.

— Listening to Different Drummers

--- Each group listens and responds to different environmental factors.

--- The school board listens to the political arena, the superintendent and other administrators to the technological and economic, and principals to changes in the community.

--- The demands coming from these different factors may require different, even incompatible responses.

--- Each group strives to satisfy its own demands, resists efforts coming from the other two groups and from the outside, too.

--- A strategy to improve one group may not necessarily be good for the other.

- Uncertainty

--- A school organization faced with these factors is assured of "passing through zones of uncertainty." Where different perceptions and contrasting norms prevail, uncertainty is certain.

--- The existence of these three disjunctive and loosely connected groups creates a situation where tasks are quite unpredictable, highly variable and often extremely difficult.

--- Traditional problem-solving approaches tend not to work well under these conditions of uncertainty.

--- Judgment, compromise and inspiration are more likely required. A school district must learn to cope with feelings of doubt and to manage conditions of uncertainty.

o The leader summarizes Domain Theory with these points:

- Domain Theory says three separate groups operate (manage) a school district.

- The three groups are "loosely coupled" (or connected); therefore, they are unlike business and industry models which are "tightly coupled," e.g., inputs are known and outputs can be predicted.

- This research supports the need for a management team model for school districts whereby:
  - Each group has much freedom and autonomy.
  - Individual initiative and creativity is encouraged.
  - Tight controls can be exercised on things such as materials and equipment budgets.
  - All participants in "management" have opportunity to openly communicate and influence decision making.
  - High quality professionals are expected to produce high quality work.
  - Trust and confidence are exhibited.

o Viewing a school district through the eyes of Domain Theory seems to justify the establishment of a neutral, problem-solving, communication device called the "Education Management Team." It offers the opportunity for these three groups to talk with, rather than to ignore, one another.

5-10 min. **Activity 9: Steps Toward Implementing a Management Team**

Leader Focus: The purpose of this activity is to help participants know what specific steps will begin the process of implementing a management team in their district.

o Using Transparency MT 9 point out that these initial steps have been effectively used to implement a management team within a district: — Trans. MT 9

- Agree on a concept of team management.

--- Members of the board, administrators and principals need to agree that such a group is desirable and worth establishing.

— The school board adopts a policy and/or passes a formal resolution.

--- Leadership from the board demonstrates to staff and community that it supports the management team concept.

o Have participants turn to page 20 of the booklet for an example policy. — Participant Booklet Page 20

— A planning period involves members of the three groups.

--- Outside help may be used to facilitate and guide this process or a task force composed of the three groups may form a temporary organizing committee.

— A work session discusses and agrees to a plan.

--- A working paper may be used to outline the name, purpose, role and function, membership, structure, meeting schedule, agenda topics, etc., and circulated among prospective management team members.

--- Agreements would be made on these aspects of a management team at the work session.

--- Some districts have developed a "contract agreement" form that all management team members would sign.

o Ask participants to turn to page 21 in their booklet to see an example of this "Contract Agreement." — Participant Booklet Page 21

— The first management team meeting

— When all preparation is finished the first meeting is held.

— Communication is made to district staff and community regarding the establishment of the management team in their district.

5-10 min.

Activity 10: A Force-Field Exercise

Leader Focus: This activity helps participants utilize insights and information they may have obtained from the workshop and apply them directly to their own situation. It is intended to help them weigh the pros and cons of a management team in their own school district.

o Have participants turn to page 22 of the booklet. — Participant Booklet Page 22

o Ask them to read the statement at the top. Next, have them work in groups of four and compile a list of the forces that are presently operating within their own district that would help (on left) or hinder (on right) the establishment of an educational management team.

o After a few minutes to allow completion of the task ask several groups to share first one item from the left side (help) and then an item from each group on the right side (hinder).

o When these have been shared, ask the group to draw possible conclusions from these lists, e.g., "It looks as though we have some barriers to overcome if we wanted to establish a management team, but it also looks as though it would be possible if we wanted one."

o Conclude the exercise by suggesting that these, and perhaps other factors, might realistically form the basis for deciding whether or not a management team would be beneficial in their own school district at this time.

TIME | MATERIALS

> Helpful Hint: If newsprint is used to record the basic ideas suggested for the Force-Field, the resulting listing is often helpful later on when participants wish to refer to it.

5 min. Activity 11: Workshop Summary

Leader Focus: This activity concludes the workshop by summarizing its purpose and leaving a basic thought with participants.

- Use the following points to summarize the workshop:
  - The purpose of this workshop was to provide information, some research and theory supporting the management team concept, to show its benefits and disadvantages, to help you examine your own district management style, to discover what modifications (if any) you would like to make in it, and to suggest specific steps that could be taken if you choose to move in that direction.
  - While materials in this workshop tended to advocate the use of team management, it must be recognized that no management style or organizational scheme will solve all problems or meet all expectations of participants. The personal characteristics of these people is fundamental to any management style. The maturity of the follower is as important as the leadership of the leaders. All members are leaders at some time or other.

TIME		MATERIALS

— A basic question for everyone is: "Will Team Management improve learning opportunities for students? If so, how?"

— Tell participants that as school board members they may wish to ask themselves if team management will better help them to carry out their functions of:

  — Providing for a program of quality instruction

  — Providing for management and direction of the school system

  — Providing for guidance through policy development

  — Providing for two-way communication between the community and the school

---

5 min. Activity 12: Evaluation

Leader Focus: This activity is intended to provide feedback to the leader on the workshop and indicate ways in which it may be improved in the future.

- o Ask participants to turn to page 23 of the booklet and complete the form provided. — Participant Booklet Page 23
- o When they are finished, have them tear the sheet out of the booklet and leave it at the door as they exit.
- o Thank them for participating.

MANAGEMENT TEAM WORKSHOPS

WORKSHOP 2: HOW TO INITIATE A MANAGEMENT TEAM IN YOUR DISTRICT

To the Leader: This is one of the three-part series of workshops on team management and is for the purpose of assisting a specific school district in starting one. Others in the series include an introductory and orientation workshop and another to assist in evaluating the performance of an operating management team.

Outcomes of this two-day workshop are:

- A management plan
- School board goals for the management team
- Role expectations for each participating group
- A statement of purpose
- A team managment model
- A role renegotiating process
- A set of working agreements
- Topics to be addressed and an agenda for the first meeting
- Signs of success for judging progress
- A list of future training needs

The workshop design follows. Please review it carefully. Additional references are found in Section 5.

Total Time: 2 days (12-14 hrs.)

How to Initiate a Management Team in Your District

TIME		MATERIALS
15-20 min.	**Activity 1: Introduction**	
	Leader Focus: Welcome participants, making necessary introductions and local arrangements. Use transparencies and the force-field exercise as warm-up activities.	
	o Use transparencies to quickly review basic materials used in the orientation and introduction workshop on team management:	
10 min.	What is Management	Trans. MT 1A Trans. MT 1B
	Management Functions	Trans. MT 2
	Five Management Styles	Trans. MT 3
	Team Leadership Works When...	Trans. MT 4
	Management Team Models (3)	Trans. MT 5 Trans. MT 6 Trans. MT 7
	Domain Theory	Trans. MT 8A Trans. MT 8B
	Steps to Implement a Management Team	Trans. MT 9
	o Summarize this brief review by asking participants to assist you in completing, on a blackboard or on the force-field analysis chart found on page 1 of the participant booklet, the problem: Why Management Teams Succeed or Fail.	Blackboard or Chartpak Participant Booklet Page 1

Forces For +	Forces Against -

TIME	MATERIALS

- The following points may be used to assist participants to complete the "fail" side of the force-field chart:
  - Lack of trust in everyday communications and interactions, causing communications to become distorted, less originality of thought, a fear of controversy and greater emotional instability
  - Confusion regarding authority and responsibility
  - Little or no feedback concerning performance
  - Lack of inservice training for members to learn new roles and skills
  - Lack of willingness to start organizational reform at the top
  - Unwillingness to devote necessary time to the process
  - Lack of a sincere desire by the superintendent not to have all the answers
  - Failure to legitimize the team's concern for its own salaries and working conditions
  - The attitude that ordinary participants in the organization cannot be trusted to exercise responsibility
- Points used at the conclusion of the Introductory Workshop may also prove helpful here.

---

5 min. **Activity 2: Purpose/Objectives and Expected Outcomes/Agenda**

Leader Focus: After the brief review (Activity 1), this activity introduces the workshop by asking participants to read the purpose/objectives and expected outcomes. The agenda is provided as a roadmap for the two days of work.

TIME		MATERIALS
	o Ask participants to turn to page 2 of their booklet. Review the workshop purpose, objectives and expected outcomes. Answer questions for clarification.	Participant Booklet Page 2
	o Refer to the workshop agenda on page 3.	Page 3
	o Tell participants that preliminary activities are now concluded and the next activity addresses the workshop purpose--<u>How to Initiate a Management Team in Your District</u>.	
60-70 min.	<u>Activity 3: A Future's Exercise</u>	
	<u>Leader Focus</u>: When we were children we often had fun playing "school," "cowboys and Indians," "doctor," etc. We used our imaginations to project how we thought people acted, how things worked, how we felt, etc. This activity has some of the same characteristics. A sample will be used first to get the idea.	
5 min	o Warm Up: Have participants describe their ideal 1990 transportation (page 4 of their booklet).	Participant Booklet Page 4 (top)
	— List important characteristics first.	
	— Now in their "dream of the ideal," have them fill in the details around the characteristics.	
	o Now have them apply the same process using their school district.	
	o Use a scenerio similar to the following:	
2-3 min.	It's 1985—The management team has been operating for 4 years. Your district has just received national recognition for outstanding and exemplary leadership through its employment of the management team concept. The award states that criteria used included "processes and procedures for shared decision making, joint problem solving, open communication and setting a cooperative example for the community."	

TIME			MATERIALS
		Practically all of the hopes and outcomes you had for the management team back in 1981 have been realized; you are very pleased and happy; you know the award is well deserved because there have been real accomplishments; much progress has been made.	
5-10 min.	o	Ask participants to work <u>individually</u> now--without talking to anyone. Have them think about the specifics that make them feel and believe that the award was justified. Like a newspaper reporter they can report incidents--episodes, ideas about what has happened and is happening. On the page provided have them write down several of these thoughts of their "Ideal Management Team of 1985."	Participant Booklet Page 4 (bottom)
10 min.	o	Next ask them to form <u>trios</u> (staying in their "dream state") and share their ideas with their small group. Have them note the ones that are most exciting--interesting--liked.	
15 min	o	Two trios now. <u>Form Groups of six</u> — Share the most interesting, best liked ideas. — Record them briefly on newsprint.	
15-20 min.	o	Ask groups to post newsprint reports on "The Management Team of 1985" and each to review them with the group.	Newsprint
5 min	o	Summarize these pictures of the future, noting: — Basic themes — What 1985 looks like — How people feel about it	
(Optional) 5 min	o	Now, tell participants they are back in 1981. On page 5, have them list three barriers they think may stand in the way of realizing this future.	Page 5
	o	Collect papers and keep for use in a later activity.	

TIME		MATERIALS
25-30 min.	Activity 4: Role of Management Team and Groups	
	Leader Focus: The previous activity had participants "dreaming" of their ideal management team. This activity deals with the hard realities of the present—where we are now and the "threat" of possible changes in the near future with the establishment of a management team. Roles and relationships will be altered under the new organization. The information contained in this event attempts to help participants gain a positive perspective of any change that may occur. A model is presented after a brief review of background materials presented earlier. The purpose of this part is to provide a framework (1) for viewing change, and (2) to recognize when role renegotiation may be needed.	
	o Ask participants to turn to page 6 in their booklet, Domain Theory. As you review this material with participants conclude by noting that researchers Mico and Kouzes believe that it is quite natural to expect the Board/Administrators/Principals to often find themselves in a state of "disjunction," "discordance" and "conflict." Typically, these groups do not keep in communication with one another. They go their separate ways! Further explain by referring to Transparencies MT 8B that they see seven factors causing this to happen:	Participant Booklet Page 6 Trans. MT 8A Trans. MT 8B
	— Separate identities and interests	
	— Differing perceptions	
	— Norm differences	
	— Discordance	
	— Struggles for power and control	
	— Listening to different drummers	
	— Uncertainty	

TIME		MATERIALS
	o Citing Domain Theory research, therefore, seems to support the concept of the need for a management team because it:	
	— Provides for neutral ground	
	— Is a place where communication, inquiry and experimentation can be fostered	
	— Can serve as a check-and-balance system among the three groups	
	o Use Transparency MT 7 to review the basic concept of the management team. Participants can turn to page 8 of their booklet as well.	Trans. MT 7 Participant Booklet Page 8
	o Explain that with this background we are ready to proceed with a short lecturette on management team and change.	
15-20 min.	o Lecturette: Management Team and Change. As leader try to cover the information which follows:	

Background: The definition of the management team assumes that it becomes a legal and formal part of the district organization. This addition represents a change in the present organization and operation. Roles will be affected for individuals and for the groups to which (board/central office/principal groups) you belong. Not many of us enjoy changes in our personal lives or in our work roles. Often it is the fear of the unknown that causes us to dislike new things, ideas or role changes. Sometimes it is helpful to gain a broader perspective of change by viewing it as a model.

In 1972 two people, Sherwood and Glidewell, introduced a theory that describes a procedure by which controlled change can enter an organization in such a way that resources (people's attitudes, energy, etc.) become more available to an organization. It comes from a clear and simple theory of how roles are established and changed. Introducing this concept offers a common view of what is happening, a vocabulary to discuss it and offers expectations for the members of the organization.

TIME	MATERIALS

Sometimes there is nothing as practical as good theory. This model describes how relations between persons and between groups are established and become stabilized so that work can get done and how change can enter the system.

- Use Transparency MT 10 and ask participants to turn to page 9 of the booklet for a copy of the Sherwood and Glidewell model. — Trans. MT 10; Participant Booklet Page 9
- Note that the model is cyclical and has four phases:
  - Sharing information and negotiating expectations
  - Commitment
  - Stability and productivity
  - Disruption
- Points that may be stressed for each phase of the model include the following:
  - The model describes how relations between persons and between groups are established and become stabilized so that work can get done and how change can enter the system. The model is cyclical, and includes four phases:

    1. <u>Sharing information and negotiating expectations</u>. When persons begin to establish a relationship which they expect may endure over some period of time they first exchange information. They are essentially trading information about themselves and establishing expectations about how a "member" of this relationship or a member of this group is going to behave.

    Once a sufficient exchange of information occurs, uncertainty is reduced to an acceptable level and the behaviors of the parties are more or less predictable. If the relationship is seen as enduring sometime into the future, then commitment to these shared expectations takes place.

2. Commitment. When commitment to a set of shared expectations takes place, then each member's role is defined, and each member knows for the most part what is expected and what can be expected from the others. The more important the relationship, the more evidence of commitment is required and the more behaviors—including attitudes, values and perceptions—are embraced by the role expectations. With commitment comes stability.

3. Stability and productivity. When there is commitment to a set of shared expectations, these expectations govern the behavior of group members and provide stability within the relationships; that is, for the most part you do what I expect of you and for the most part I do what you expect of me. This stability in the relationships leads to the possibility that work can now get done. While stability does not guarantee productivity, it is necessary for productive work to occur. The energy of the participants is now available for other things since their relationships are sufficiently predictable that they no longer require sustained attention.

4. Disruption. Disruption occurs because of a violation of expectations by the participants or because of external intrusion into the system. It is assumed that disruption is inevitable; only the duration of the period of stability varies because (a) information is never completely shared during the initial period when expectations are negotiated and (b) individuals, groups and organizations are viewed as open systems, i.e., they change as a consequence of transactions with their environment.

...Recycling can begin. At the point when disruption occurs change can enter because expectations are no longer fixed. New information can now enter and a renegotiation of expectations can occur. Recycling can begin starting back at #1 and going to #4.

...Finally, the model predicts disruption without renegotiation will lead to an increasing frequency and intensity of disruptions. To prevent this, problems or difficulties need to be addressed directly and as soon as they occur. Relationships are seen as in a constant state of adjustment and change.

- Conclude this section by explaining that the purpose of presenting this model is to gain a perspective of where we are with respect to the management team and attempt to anticipate where it will take us. Sometimes change creates a "lost feeling." This model may help prevent some of these "uncertainties" by charting a course through change. Pose questions such as the following to demonstrate how the model operates:

  — As you view the model, where would you say you are (today)?

  — What are some examples of a "pinch" in your organization?

- Tell participants that while we have been dealing with a theoretical model in this part of the workshop we will deal directly with actual situations in the next activity.

TIME			MATERIALS
45-60 min.		Activity 5: Role Expectations of the Management Team Members	
		Leader Focus: This activity hits directly at a major source of conflict within organizations, e.g., role expectations. With the anticipation of establishing a new group within the school organization, it is crucial to clarify at the outset what roles are to be played by the participants! There are three parts to this exercise: definitions, role expectations, and the analysis of the role expectations.	
10 min.	o	Part I: Use Transparency MT 11 to explain that different definitions concerning roles exist. These include:	Trans. MT 11
		— Role Expectations: What others think the person/group is responsible for and how it should be done	
		— Role Conception: What the person/group thinks his/her job is and how he/she has been "taught" to do it	
		— Role Acceptance: What the person/group is willing to do	
		— Role Behavior: What the person/group actually does	
		Conclude by explaining that we are dealing more or less with all four definitions; however, the primary focus is with role expectation at this point.	
20-30 min.	o	Part II: Next, explain that in order to reach commitment on roles we need to share information and possibly negotiate expectations. The procedure we are going to use gets right to the heart of the question of role definition. The process is simple enough though the logistics are a bit complex.	
		Ask participants to listen carefully to these directions:	
		— We will divide into the groups within the management team.	

TIME		MATERIALS

— Each group will have the same two tasks:

Task 1: List the expectations you have for your management team.

Task 2: List the expectations you have for your <u>own</u> group and for each of the other groups.

— Ask participants to turn to their booklet, pages 10-15 and use the space provided. — Participant Booklet Pages 10-15

— List expectations of your own group with respect to the management team and those of the other groups. Therefore, responsibilities (if included) should look like the following:

<u>Board</u>	<u>Cent. Adm.</u>	<u>Princ.</u>	(if included) <u>Vice Prin.</u>
Cent. Adm.	Board	Board	Board
Prin. Grp.	Prin. Grp.	Cent. Adm.	Cent. Adm.
Mgmt.Tm.	Mgmt.Tm.	Mgmt.Tm.	Prin. Grp.
Vice Prin.	Vice Prin.	Vice Prin.	Mgmt.Tm.

— Make certain that the task is clear before proceeding. Individuals may work alone and then share their ideas with their group, or each group can work as a unit on the task. There is to be only one summary paper representing the opinion of each group and their expectations for each group. Therefore, the board will receive one paper from principals regarding their expectation of the board and one each from the other groups.

— Allow sufficient time for completion or near completion of this task before proceeding.

15-30 min. o <u>Part III</u>: Next stop work and ask groups to exchange their papers such that they have: (1) their own role expectations paper, (2) the expectations paper from each of the other groups for them and (3) the leader has the expectations of the management team from all groups. (As leader, you will need to review the papers from all groups in order to report later.)

TIME	MATERIALS

- Ask them to listen carefully for directions, such as:
  - Using your own paper of expectations
  - Comparing each of the other groups' expectations of you with your own
  - Noting where expectations are similar
  - Noting where expectations differ
  - Discussing the results among yourselves as a group. See if you agree or disagree with these expectations.
- Explain that any differences that exist will need to be examined fully at a later point in the workshop to become resolved. Clarification of these roles is necessary prior to the initiation of the management team.
- Now, ask to hear brief reports from each group on commonalities and differences as shown by the brief analysis. Rotate quickly from group to group.
- Conclude by (1) sharing the likenesses and differences of the expectations collected from the groups, (2) noting that the next activity proposes <u>one</u> way to negotiate differences in role expectations and (3) sharing what all groups expect from the management team.

TIME		MATERIALS

30-40 min. **Activity 6: Role Negotiation**

Leader Focus: Recognition of feelings of frustration or conflict regarding roles played is the fist step in a process of renegotiation. What action to take is often unclear to us. Resolving differences is usually easier when we have a known process to follow. The purpose of this activity is to demonstrate a simple three-step procedure for renegotiating role expectation differences. (Obviously, it could be used for other areas of disagreement.) This activity consists of a short lecturette and three brief demonstrations of the steps involved.

10 min. o Lecturette: Role Negotiation. Cover information as follows:

If we return to the model for change as suggested by Sherwood and Glidewell we see that at some point a "pinch" may be felt by individuals or groups. Alert organizations and managers watch closely for such occurrences in order to implement a procedure that is called "planned renegotiation." If recognized in time and appropriate action is taken, disruption can usually be prevented. (What were "pinches" that we identified?)

Roger Harrison has developed a process he terms a tough-minded approach to team development. He calls it simply enough Role Negotiation. These procedures intervene directly into the relationships of power, authority and influence within the group. It avoids probing into the likes and dislikes of members for one another and their personal feelings about one another. It is more aligned to the task oriented norms of business than other behavioral approaches such as interpersonal relations--sensitivity training, etc., where competition, conflict and struggle for power and influence tend to be explained away or ignored. Behavioral approaches assume that people will be collaborative and productive if they are taught how or if the barriers to their doing so are removed. These approaches see power struggle as a symptom or a managerial mistake rather than as a basic and ever present process in organizations. The problem of organizational

TIME			MATERIALS
		change may rather be seen as one of releasing human potential for collaboration and productivity rather than as one of controlling or checking competition for advantage and position. Harrison's role negotiation technique can be used by individuals or groups. It does make one basic assumption: <u>that most people prefer a fair negotiated settlement to a state of unresolved conflict</u> and that they are willing to invest some time and make some concessions in order to achieve a solution. The modest risk called for from participants is that they must be open about what changes in behavior, authority, responsibility, etc., they wish to obtain from others in the situation.	
10-15 min.	o	Ask participants to turn to turn to page 11 of their booklet for Step 1: Issue Diagnosis. Review it briefly with the group. Suggest that groups use issues or differences noted in previous activity as a basis for working through this exercise. Ask each group to complete the three questions on page 15. When all groups have completed the three questions ask them to give their paper to the appropriate group (shown at the top of the page).	Participant Booklet Page 15
10-15 min.	o	Have them carefully read the responses their group has received. To help them summarize the messages they have, ask them to turn to page 16 of their booklet and fill in the chart with this information. Do so for each message received from a group. Wait until completed. The purpose of Step 2 is to make certain the messages sent have been understood.	Participant Booklet Page 16
	o	Tell participants they are now ready for the final step (3) in this procedure. Have them turn to page 17 of their booklet. It asks for the group to <u>write</u> an agreement for messages they received. Have them decide among the members of their group the extent to which they are willing to carry out the actions indicated in the messages they received. Ask them to write the group's agreements under the three headings on the paper provided.	Participant Booklet Page 17

TIME	MATERIALS

- Summarize the activity using such points as:
  - — Did it work for your group? How real was it?
  - — Did your group have problems or difficulties with any statement? If so, which one(s)? Why?
  - — Do you think this might be a practical procedure for you to use? Why or why not?
- Tell participants that the next activity deals with the provisions they would like to see built into their district management team. Ideas and suggestions they may have received from the workshop on Introduction and Orientation to Team Management will be very usable. They may wish to refer to any notes they took at that workshop.

TIME		MATERIALS
Day 2	Activity 6: Management Team Organization and Operation	
	Leader Focus: Informational and theoretical inputs have been made. This activity attempts to use these data together with personal values and opinions of the participants to begin developing the structure of the management team.	
	In the first workshop participants engaged in an activity that initiated looking at the organizational plan for the district. Remind them that they first drew a diagram of how they believed the district was presently structured. Second, they were asked to make any changes in it to represent their ideal or desired organizational plan.	
	This activity continues the process toward agreement of the management team structure. A few additional items are added.	
15-20 min.	o Have participants choose a partner (different from the one in Workshop 1)	
	o Using their notes from the previous meeting and/or ideas they have thought about since, ask them to diagram in the space provided in their booklet, page 18, an organizational plan that incorporates their concept of a management team as an integral part of the district. There are three questions to answer after they have agreed upon the design.	Participant Booklet Page 18
	1. What size is the management team?	
	2. Who are members?	
	3. Who is the chairman and how chosen?	
5 min.	o When they have completed this portion, ask them to join another pair of participants in order to:	
	— Share their designs and answers to the three questions	
	— See if they agree and/or where their differences are	
	— Resolve them if possible or propose them as viable alternatives	

TIME		MATERIALS
10 min.	o Next, have them form groups of eight, repeat the process, record their own group's agreements on newsprint for posting and describing to the group.	
	o Groups of eight report to total group.	
	o As a group briefly analyze commonalities and differences and summarize activity. (If needed, appoint volunteers to take information and compile a report for the group.)	
	o Tell participants they are now ready to become much more specific. The next exercise is an "in-basket" type activity that will deal directly with situations that may be quite familiar to them.	

15-25 min. **Activity 7: Clarifying Decision Making: An In-Basket Exercise**

Leader Focus: In some districts the democratic spirit can be overdone to the point that everyone expects to be involved in all decisions no matter how trivial. When decision making in a district is decentralized it is very important to agree upon who has power for what types of decisions. A group's power varies with the type of issue, therefore, it is crucial to agree on how the decision should be made.

There are two parts to this exercise. The first part describes a process that may be used to clarify the decision-making power a group may have in a specific situation. Second, a realistic situation is given each group to discuss and allocate the level of influence they believe is appropriate to that situation.

- o Ask participants to turn to page 19 of their booklet and read the directions on page 20. Clarify as necessary. — Participant Booklet Pages 19-20
- o Next, explain that the following exercise addresses decision making directly through an "in-basket" experience. Several typical district situations have been selected. Their

TIME		MATERIALS
	group (board, central office, principal and vice principal) will "draw one from the hat," read and discuss it and agree on who or what group should have what type of influence in that situation. Any questions?	
	o Using a container (hat) into which the ten situations have been placed, allow each group to select one.	Situations for Mgmt.Tm. Page 22-23
	o Ask each group to use the chart on page 21 of their booklet and write in the spaces provided the amount of influence the different groups should have in that situation.	Participant Booklet Page 21
	o Circulate among the groups while they are deliberating, clarifying and answering questions as needed and/or just observing the manner in which they proceed with the task.	
	o Allow groups to select a second or even a third situation if they complete their task ahead of other groups.	
	o When most groups have had time to experience at least one in-basket situation stop the exercise and conclude with a short debriefing of the activity. Use such points as:	
	— Did you find your situations to be realistic?	
	— Was it one that you think could/should be handled by the management team? Why? Or why not?	
	— Do you think it helpful to use a process like this? How would you use it?	
45-60 min.	Activity 8: Management Team Meeting: Role Play	
	Leader Focus: The workshop is nearly finished, however, many items are incomplete. This activity has a dual purpose: (1) to finish as many of these items as possible and (2) to demonstrate a management team meeting in process while doing so.	

TIME		MATERIALS
	o Explain to participants that discussion and decisions are needed on several items prior to the establishment of a management team. To accomplish these tasks we will hold a "management team meeting." This will help them gain experience as a team while actually making the decisions that are still necessary. We will attempt to model processes and techniques that could be used when their management team is founded. Tell them that as their workshop leader you will serve as the meeting facilitator.	
	o Ask participants to turn to page 24 of the participant booklet, "Management Team Meeting: Role Play." Contained there is the order of business and agenda items. (The actual items for consideration may vary depending on the needs of the group. The ones proposed are sufficient to enable participants to "experience" a management team meeting and to accomplish the workshop objectives.)	Participant Booklet Page 24
	o Ask them to follow the order of business as shown. Divide the participants into eight groups (number off 1-8) and assign each group a task. Give them a prepared folder containing background information, examples and other pertinent data that will assist the group with its task.	
	o Monitor the progress of the groups, clarifying where necessary, suggesting certain groups communicate with each other because of relatedness, etc.	
	o When most groups have completed their work reassemble as a total group and ask for reports.	
	o As leader conduct the meeting in such a manner as to obtain as many agreements on the issues as possible. If additional work is needed on some of them, gain commitment by the group to complete it and the date when it will be finished. Model good meeting processes and procedures.	
	o Close the meeting by summarizing what has been accomplished and what remains to be done and by whom, when!	

TIME		MATERIALS
	o Debrief meeting with group. In what ways could the meeting be improved? What did you like about it? Dislike? The next time we meet I hope we...	
10-15 min.	Activity 9: Workshop Conclusion	
	Leader Focus: Workshop closure is equally as important as a good introduction. There are three parts to this closure activity: (1) workshop summary, (2) next steps and (3) workshop evaluation.	
	o Ask participants to turn to page 3 of their participant booklet and review the agenda items that were used. Refer also to the expected outcomes to see the extent to which each one was realized. Go over them with the group to determine the response of the group to each item.	Participant Booklet Page 3
	o Next, list on the blackboard or chartpak any items that remain unfinished. Ask who is responsible for the completion of each item and the date when it can be expected. (Keep list for future reference.)	Blackboard or Chartpak
	o Have participants turn to page 25 of the booklet, the Workshop Evaluation. Ask them to complete it. When finished tell them to tear it out of their booklet and pass it to you.	Participants Booklet Page 25

MANAGEMENT TEAM WORKSHOPS

WORKSHOP 3: EVALUATING THE MANAGEMENT TEAM

To the Leader: This is one of the three workshops designed for the management team and is for the purpose of evaluating an already existing one in a school district. The other two workshops are to introduce the concept of a management team to school board members and to help district personnel initiate a management team in a district.

The evaluation process involving the management team of a school district is an individualized situation. This workshop needs to be tailored to the uniqueness of the specific district since management teams vary widely from district to district. Therefore, the materials in this workshop have been prepared with alternative instruments and a flexible process.

Two instruments are available as well as an easily adaptable process to use with management teams wishing to engage in self-evaluation. These forms have been provided on the assumption that some type of questionnaire will form the basis for surveying management team members to obtain data for the assessment. A third optional procedure, instead of using the forms provided, asks a district to determine its own set of criteria and questions for use with members of its management team.

The three options included are:

1. Management Team District Appraisal Form - WSSDA

   This form addresses the potential four groups of the management team: board, superintendent, district administrator and principal and vice principal. Ten specific items for each group address concerns about each. All members are expected to answer questions about all groups including their own. The ratings range from Exceptional (1) to Not at All (5) with space for a "don't know" response. After completion of the form by all groups and tabulations among and between groups are ascertained, an opportunity is provided for a thorough and open discussion of the results. Third party assistance (state association personnel) facilitates determining priorities and developing an implementation plan.

2. Management Team Evaluation Form

   The eight characteristics of a "healthy" work group as defined by Likert are used to survey members' opinions of the management team. Again a discrepancy model is used whereby participants use a seven-point scale to answer each question. Two dimensions for each one are used to determine level of satisfaction: NOW and WISH IT WERE. The workshop consists of a presentation of the resultant data, discussions and agreement on an action plan for implementing improvements.

3. District Develops Its Own Instrument

The district establishes a set of criteria to use in its own survey. Questions are developed and circulated among management team members for completion. A work session is used to report the tabulated data to the entire group. Discussions lead to agreements of how and what modifications will be made in future management team operations.

Comparison of the Distinguishing Features of Each Option

A. Making the Management Team Concept Work: District-Level Appraisal (WSSDA)

- Addresses ten specific questions to each of the four groups: school board, superintendent, district level administrators, principals and assistant principals—total 40 items
- Uses a five-point scale for each question (1 = exceptional, 5 = not at all)
- Provides long list of 27 items that may help identify "areas of possible improvement" asking for "problem or weakness" and "action indicated"
- Recommends involvement of state association resource teams representing boards, superintendents and principals
- The same questions are responded to by everyone

B. Management Team Evaluation Form - NWREL

- Uses only eight general questions to identify areas that are of significance to the management team
- A seven point scale (1 = low, 7 = high) is used to find NOW and WISH IT WERE points for each question
- Requires the least time of participant to complete and tabulate it
- The same questions are asked of everyone

C. District Developed Survey Form

- o Can become as complex or simple as desired by local district
- o Questions can be developed that address directly the goals, purposes and/or concerns of the management team
- o Expects a greater involvement of local personnel in the total process
- o May require a longer period to complete since the basic instrument must be developed
- o Local personnel may gain greater understanding of the total evaluative process by being involved in all aspects of the assessment

The process for this workshop can be the same for whichever option is used and includes:

A. In cooperation with the district determine which type of survey is desired.

B. Have members of the management team complete (or develop and complete) the survey form.

C. Tabulate results by district and by groups.

D. Schedule a work session of the management team at which tabulated results are fed back to the whole group.

E. Select priority areas where improvements and/or changes are desired.

F. Set three to five goals in terms of desired outcomes 1-2-5 years distant.

G. Agree on next steps and decide what measures of success will be used to judge progress toward these goals.

The overall purpose of Unit 3 is to assist a school district to implement an effective evaluative procedure in assessing its management team. Objectives include:

- Getting a district to use a third party facilitator to enhance objectivity and valid procedures
- Developing an evaluation plan which takes into account the uniqueness of the district
- Providing for maximum involvement of district personnel in the assessment plan
- Helping the district utilize the survey data to set realistic goals for the future of the management team

The following information offers suggestions on implementing each of the procedures for Unit 3.

TIME		MATERIALS
30-60 min.	Activity 1: Respond to District Request	
	Leader Focus: Discussions in person or via telephone (or conference call) with district board chairman/ superintendent review the options available for the assessment. Selection of the desired option hinges upon factors such as: length of time management team has been in operation; time available for assessment; availability of district personnel to conduct survey procedures; the desired role for the association to play; and others. The outcome of this event is an agreement with the district that one of the four options for the assessment has been chosen so that work can proceed.	Copies of survey forms and/or brief explanation of them
	Helpful Hint: Caution is needed not to allow proposed survey forms to circulate freely within the district. This could damage their valid completion later on and the results of it.	

TIME		MATERIALS
Est. 1-3 weeks	Activity 2: Completion of Survey Instrument	
	Leader Focus: Sufficient time is needed during this phase to enable all members included in the management team the opportunity to complete the survey form and return it to the designated place. The goal is to obtain 100 percent participation and to preserve the confidentiality of respondents.	Survey Form
Est. 1-6 hours	Activity 3: Tabulation of Survey Forms	
	Leader Focus: A decision will have been made regarding local vs. third party tabulation of these forms. Depending upon the form used and the numbers of people involved, it may be necessary to count on using a computer for the tabulation. Also it is important to tabulate the results of each question for the district as a whole and for each subgroup separately. For example, it would be possible to have (1) a district total, (2) one for the board, (3) the central administration, (4) principals, and (5) vice principals if they had all been included in the survey. Group-to-group comparisons can prove highly interesting and beneficial during later analyses. Note: If the NWREL form is used, follow instructions for tabulation and analysis as found in the Keys package entitled School Board Self-Assessment by Leslie Wolfe.	All Survey Forms
2-3 hours	Activity 4: Work Session	
	Leader Focus: This is a crucial event in the evaluation process. Scheduling a time for this session when everyone can attend is vital! The focus during this workshop will be on learning how the answers of each member of a subgroup compares with his/her own group, with other groups and with the district as a whole. Therefore it is important for each participant to receive this information in person.	Tabulated results and individual Survey Forms

TIME MATERIALS

The purpose of the work session is to identify general areas of common concern and, depending upon time available, develop a plan for dealing with them. It may be that immediate plans can be developed at this session; however, it is more likely that additional time and information will be needed.

The work session includes procedures such as the following:

- Explain purpose of the work session.
- Report tabulated results for the district as a whole.
- Have subgroup meet to receive the tabulated results of their own group's responses, the opportunity to compare to other groups' responses and to identify major areas of concern for their own group.
- As a total group examine, discuss and understand reports from the subgroups.
- Decide as a total group on the three to five major concerns of the management team.
- Discuss and agree on the steps to deal with these concerns immediately and/or long range.
- Convert concerns into goals both short and long range and establish a priority among them.
- Develop plans of action for each goal area with indicators of success for their accomplishment.
- Conclude work session with a summary of actions agreed upon, assignment of responsibilities and the time schedule for these actions to become implemented.

Helpful Hint: If state associations for school boards, superintendents and principals are active locally and/or statewide, elected representatives of each are a good source of leaders to assist with this work session.

SECTION 4: EVALUATING THE WORKSHOP

Evaluation of processes and materials has been a built-in feature of this workshop during its development and testing phases. As a workshop leader, you are encouraged to continue evaluating the workshop, in order to find ways to improve it or modify it for your purposes.

Testing

Initial testing, carried out by the developers, focused on issues of appropriateness and match. Here, participants were asked to comment on:

- Language used in presentations and materials
- Clarity of objectives for activities
- Relevance of the topic for school boards
- Receptivity of participants to presentation styles, activities and materials

In later stages of development, other evaluation questions were asked of participants. These questions sought to gain feedback to workshop leaders about issues of:

- Adequacy of treatment of the topic
- Time allocations for various portions of the workshop
- Participants' ratings of the effectiveness of workshop leaders' presentations and of workshop activities and materials

As a result of the feedback from these participants, several modifications in the content and the processes were made. When the introductory and implementation workshops were used with school boards and administrators, they rated the workshop activites between 5 - 7 on a seven point scale (7 = high) with an overall workshop rating of 6.2. Your ratings should compare favorably with these. If they do not, evaluation can be effectively used to find out what the problems are.

Why Evaluate?

Continuous participant feedback to you as you present the workshop can be helpful in several ways:

- Personal growth and development. Whether you are new to workshop presentations or a seasoned veteran, participant feedback can be helpful in your personal and professional development. Participant evaluation of your presentation style, of how helpful you were in their learning, of how you handle time and materials can be invaluable to you as a source of growth.

- Adapting the workshop. Participant feedback can give you ideas and suggestions which will be helpful to you in planning future presentations of the workshop. Perhaps more time needs to be spent in one area. Perhaps objectives need to be made clearer. Perhaps participants grew too tired during the presentation. These participant perceptions and feelings will provide information for you to consider as you continuously adapt and modify the workshop in successive presentations.

- Improving materials and activities. Participant feedback will give you clues as to how to improve upon the basic workshop structure and materials. You may need more information about the local districts or clarify some material that was misunderstood. Perhaps a few visuals could be used such as transparencies. Maybe physical arrangements were inadequate, etc.

Again, participant feedback can be an important basis for decisions like these.

What to Evaluate

An adequate evaluation of a workshop provides you, as workshop leader, the kinds of information you need to determine how well the presentation achieved your objectives. It also gives you an indication of how well the presentation met the needs and expectations of participants.

- Objectives—The objectives of the workshop are stated in terms of knowledge/information which participants are expected to gain, skills they are expected to develop, or attitudes they are expected to have as a result of the experience.

  Evaluation of objectives can involve questions of clarity (Are the objectives clear to participants?), questions of appropriateness or match (Do the objectives meet participants' needs and expectations?) and questions of achievement (Do participants gain in information, skills and attitudes?).

  The first two kinds of questions are relatively easy to assess during the workshop. The third, while very important, is the most difficult to assess.

- Presenter—The skills of the presenter in conducting the workshop is another area for evaluation.

  Questions in this area might focus on the presenter's delivery of lecturettes, helpfulness in workshop activities, knowledge of the subject and other concerns.

- Workshop processes—These include the procedures and activities designed to result in learning. Among the workshop processes are lecturettes, small and large group discussions, quizzes and questionnaires.

Evaluation of these processes involves questions regarding their contribution to participants' understanding, learning and skill development.

Questions for Evaluating This Workshop

The questions on the following pages are those included in the participant booklet for evaluation of presentations of these workshops. They represent a comprehensive and adequate set of workshop evaluation questions, speaking to objectives, presenter and processes.

MANAGEMENT TEAM WORKSHOP 1--EVALUATION

Check one:
_____ School Board member
_____ Administrator

Your frank answers to these questions will help us improve this workshop. Please be candid.

1. General Rating: Please mark two (2) things on the scale below to indicate:

   A Your expectation of the workshop when you arrived

   B Your feeling about the workshop after participating in it

1	2	3	4	5	6	7
Very Poor			Average			Very Good

2. The objectives for the workshop were:

   _____a. Very clear to me

   _____b. Somewhat clear to me

   _____c. A mystery to me

   Comments: _____

   _____

3. In my view, the workshop presenter(s) were:

   a. Knowledge of topic
      _____Extremely knowledgeable
      _____Knowledgeable
      _____Not knowledgeable

   b. Preparation
      _____Well Prepared
      _____In need of more preparation
      _____Poorly prepared

   c. Helpfulness
      _____Very helpful
      _____Somewhat helpful
      _____Not helpful

4. What I liked most about the workshop was _____

   _____

   Least liked _____

5. Suggestions, ideas or comments to improve the workshop: _____

   _____

   _____

   _____

MANAGEMENT TEAM WORKSHOP 2--EVALUATION

1. General Workshop Rating: Mark two (2) things on the scale below to indicate with an

   A your expectation of the workshop when you arrived, and a

   B to indicate your feeling about the workshop after participating in it.

1	2	3	4	5	6	7
Very Poor			Average			Very Good

2. Workshop Activities

Please estimate the value to you of each workshop activity. Choose a number from the scale (below) to show its worth to you and write it in the space following the activity name. Please add comments if you wish.

1	2	3	4	5	6	7
Worthless			Some Help			Very Beneficial

Activity	Rating	Comments
a. Futures Exercise	____	_____
b. Change Model (Sherwood &b Glidewell)	____	_____
c. Role Expectations (Group expectations)	____	_____
d. Role Negotiations (Roger Harrison's technique	____	_____
e. Management Team Organization (Management Team design, etc.)	____	_____
f. Clarifying Decision Making (In Basket exercise)	____	_____
g. Management Team Meeting: Role Play	____	_____

(Over)

3. Workshop Leadership:

1	2	3	4	5	6	7
Poor Leader			Average Leader			Skillful Leader

4. Suggestions, ideas or comments to improve the workshop:

MANAGEMENT TEAM WORKSHOP 3--EVALUATION FORM*

Below are listed several characteristics of an effective management team. As you read each one think about the management team in your district in two ways:

A. How much is there NOW?

B. How much do you WISH there were?

Rating Scale:

1	2	3	4	5	6	7
Low Minimum			Average			High Maximum

Instructions:

For each item rate the statement using the scale above. There are NO right or wrong answers. For example:

	How Much NOW?	I WISH it Were?
How rewarding is it to be a Management Team Member?	____	____
1. Working conditions are familiar and relaxed. (Members do feel comfortable about making suggestions without fear of embarrassment, punishment or disapproval.)	____	____
2. There is receptivity to innovation and change. (There is a search for improved methods and a supportive climate for achieving objectives.)	____	____
3. Maximum contribution of each member is encouraged. (Individual strengths are built upon and opportunities provided for personal and professional renewal.)	____	____
4. Active participation of all members in decision making is provided for. (There is active involvement of the team in processes of problem definition, generation of alternatives and selection of a solution.)	____	____

*Adapted from R. Likert: "Characteristics of an Effective Management Team."

	How Much NOW?	I WISH it Were?
5. Members' values and goals are used. (Full discussions of all proposals and ideas draw upon the best wisdom the group has to offer.)	____	____
6. Confidence in group ideas is developing. (Goals established are achieved into expected results.)	____	____
7. There is open communication. (Each person on the team has equality of access to each other's ideas and information.)	____	____
8. There is creative use of conflict. (Divergent thinking is seen as constructive as long as interpersonal problems are not getting in the way.)	____	____

SECTION 5: RESOURCES

Three papers provide background information for these workshops on the management team:

1. Why a Management Team?
   A concept paper by Ray E. Jongeward

2. The Educational Management Team—Opportunity for Quality and Local Control
   A review of recent research and three proposals by Ray E. Jongeward

3. School Management Teams: What Are They and How Do They Work?
   By Lloyd A. DuVall and Kenneth Erickson, University of Oregon

80

WHY A MANAGEMENT TEAM?

A Concept Paper by Ray E. Jongeward

As our society moves toward becoming an information society recognition is increasingly being given to the concept that information is power. Having it makes one potentially powerful. Lacking it causes a feeling of helplessness. The increasing complexity of school management, teacher unionism and the growing expertise of professionals has greatly reduced the number of superintendents or boards who tightly control information resources in school districts. Other factors such as superintendent turnover and eroding health of administrators offer convincing evidence that attempting to "do it alone" is not producing desired results or providing job security for the superintendent.

Little wonder then, that changes in the way school districts are managed appear more frequently on the educational scene. One such change is sharing management responsibilities. The term most often used is the management team or names such as administrative council, team or cabinet. Whatever the name—it varies widely district to district—the intent is similar, i.e., to broaden the information and decision-making base of management. Getting, sharing and using information to problem solve, make decisions and formulate district policies is the core of the management team philosophy. At least two factors are operating when this concept is employed, i.e., building principals are brought into more active partnership and school boards share their policy development making power with administrative personnel.

A management team flourishes in communities where there has been a tradition that decisions are to be shared, the superintendent has a democratic leadership style and where the school board is proactive. The total size of district staff and the amount of geography contained in the district also are factors influencing the use of management team ideas. A broad assumption among districts using management team concepts is that people who are affected by decisions should have opportunity to influence them. The advantage claimed when this happens is smoother, easier and more complete implementation of decisions made. Greater ownership in these decisions results when responsibility is shared for making decisions work.

Recent research literature is viewing school systems as organizations that are "loosely coupled." That is, unlike business-industry where inputs are known and outputs predictable, schools deal with many unknowns and cannot predict outputs. Researchers reason that a school organization is made up of "disjunctive" and "ill fitting" pieces. Often groups within the system are naturally on a collision course with each other. Several factors, they propose, are at work tending to separate and disconnect the school board, administrators, principals and teachers from one another. The very nature of expectations of these different groups tends to pit one against another. As a consequence, researchers say, tension and conflict are predictable results of these group interactions.

If the researchers' view of school organization is realistic how can one expect smooth, effective management to exist? One answer may be found in the establishment of the concept of team management. Adding this dimension to a school organization may aid communication and decision making aspects of management.

The introductory workshop explores the benefits and problems of team management. The implementation workshop develops a management team that provides techniques and processes for facilitating communication among and between the management groups. It also suggests ways in which change may be viewed and what to do when the signs of tension and disagreement appear. The management team is seen as the bridge that connects the groups together and keeps traffic (activity) flowing without major disruptions. The materials on evaluation provide a means for identifying strengths and weaknesses in an operating management team.

THE EDUCATIONAL MANAGEMENT TEAM--

OPPORTUNITY FOR QUALITY AND LOCAL CONTROL*

by Ray Jongeward

> Even for practical purposes, theory generally turns out the most important thing in the end.
>
> --Justice Oliver Wendell Holmes

Background

How school districts are organized to do their work has been a subject that has received much attention over the years. Studies frequently searched for ways to make school systems more efficient and effective through differing staff arrangements. Researchers examining these organizational patterns found that the dominant structure used by school districts was primarily based on industry-specific theory and practice. Traditional methods and procedures used in business-industry were systematically transferred and used by school districts and other institutions in the human services field, the assumption being that the same theories and practices applied.

Recently, researchers have questioned this assumption. Claims are being made that school districts need a different model which requires both new organizational theory and practice. Recently, one has been proposed called Domain Theory. The researchers (Kouzes & Mico) maintain that human service organizations (HSOs) unlike business and industry are comprised of three distinct domains—the Policy Domain, the Management Domain and the Service Domain. They suggest that each domain operates by different and contrasting principles, measures of success, structural arrangements and work modes.

---

*Excerpts and rewording of material prepared by James M. Kouzes and Paul R. Mico entitled "Domain Theory: An Introduction to Organizational Behavior in Human Service Organizations," Journal of Applied Behavioral Sciences, Vol. 15, No. 4, 1979.

Interactions among and between the three domains create natural conditions of disjunction and discordance. Researchers believe that this new concept of organization may well serve as a guide toward the development of different methods and tools. When developed they would be specific to human service organizations rather than borrowed from business-industrial models.

Human service organizations are defined by researchers as "the set of organizations whose primary function is to define or alter the person's behavior, attributes or social status in order to maintain or enhance his or her well being." In general, these types of organizations are concentrated in the fields of health, education and social welfare. Examples include hospitals, medical centers, mental health centers, social service agencies, public health agencies, public schools, universities and nursing homes. They also include police departments, correctional institutions, employment services and probation departments.

The following two figures illustrate the researchers' belief that human service organizations contrast sharply with business industry models.

FIGURE 1

CONTRASTS OF BUSINESS/INDUSTRY AND HSOs

Item	Business/Industry	Human Service Organizations
Purpose:	Make a profit	Provide quality service
Target:	Owners	People served
Finance:	Private money	Public taxes
Roles:	Usually clear and specific	Often ambiguous and problematic
Work Force:	Technical	Professional
Processes:	Employee-product	Staff-client interactions
Organization Style:	Tightly coupled	Loosely coupled
Means-ends Relationships:	Definitely limited or fixed	Not well known, indefinite, not fixed
Inputs:	Usually visible and tangible	Often not clear and intangible
Measures of Success:	Quantity	Quality
Environmental Influences:	Industry, resources and suppliers	Political and professional communities

FIGURE 2

ORGANIZATIONAL BEHAVIOR COMPARISONS

Business/Industry Model	Human Service Organization Model
o Assumes management exercises major influence over the organization.	o Policy is "boss" and influences the entire organization.
o Single, vertical (hierarchical) control and coordination is the organizing structure of the company.	o Three groups vie for control--policy, administration and service--creating relative tension among them.
o Managerial control and coordination follows "line and staff" methods--tightly organized.	o Collegial-professionals see themselves capable of self-governance and have the expertise to satisfy clients.
o Managers are accountable for what their subordinates do or don't do.	o Professionals believe they are accountable to themselves and the profession. . .are reluctant to submit to "managers."
o Rules and programs are institutionalized.	o Programs and rules often vary widely, depending upon client needs and environmental pressures.
o Authority relationships are clear and specific.	o Professional standards and practices impose authority for personnel actions and program efforts.
o Relationships are impersonal, often formal.	o Often relationships are one-to-one, personal and intimate.
o Assembly line methods are favored, e.g., MBO PPBS, ZBB MIS--rational problem solving.	o Free flow of ideas, values and beliefs, creativity, innovation are prized.
o Success is measured through cost efficiency and effectiveness procedures, output exceeds input and organizational objectives attained.	o Quality of programs and meeting professional standards are important success measures. Input not easily quantified. Output often not known and attainment of objectives left in doubt.
o Focus is on single product. Effort is concentrated.	o Emphasis is on individual and groups of clients requiring many varied inputs. Effort is generalized over a long period of time.

These two figures illustrate, but do not define, all the contrasts of HSOs and industrial organizations. Not all apply to either organizational group.

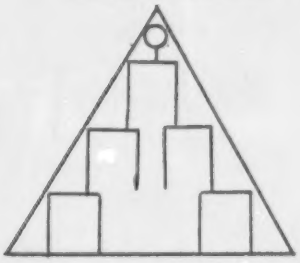
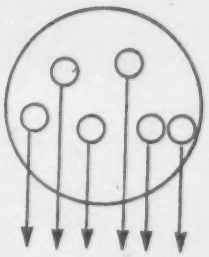
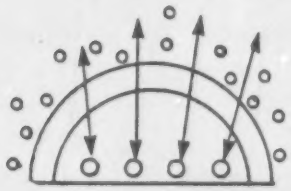
Application

Applying the researchers idea of Domain Theory to public school organization, we can easily identify the three domains within the school system: (1) Policy--The School Board, (2) Management--Superintendent and other Administrators, (3) Service--Building Principals. Each of these groups is organized to perform their basic tasks. The school board must respond to citizens/parents who elected them as their representatives. Superintendents and other administrators are careful about their accountability to the school board and the public. They develop methods and procedures that demonstrate efficient and effective use of resources and achievement of district goals. Building principals, working more like colleagues with other professional staff members, use their professional training to respond to needs and demands of the students (parents and general public pressures, too!).

Figure 3 helps illustrate these contrasts.

FIGURE 3

THE THREE DOMAINS OF SCHOOL ORGANIZATION

POLICY	ADMINISTRATION	SERVICE
The Electorate		
		
School Board	Superintendent/Administrators	Building Principals
o Elected to represent the people and perform by the consent of the governed.	o Employed by the board to carry out its policies.	o Employed by board to exercise professional judgment in serving students.
o Work together by voting, bargaining and negotiating.	o Uses vertical control and coordination techniques that are bureaucratic and impersonal like MBO and PPBS.	o Relationships are collegial; service is highly individualized/personal.
o Interested in equality, justice and impartiality.	o Interested in cost efficiency and program effectiveness.	o Autonomy, self-regulation and creativity govern their work.
o Operate in a political arena with the public courts, legislatures and state departments of education.	o Conformity is often a goal of management.	o Problem solving used as an important tool. o Respond to cultural demands within the community.
o Must cope with teacher unions, pressures from the public and professional standards of practice.	o Must cope with teacher unions, pressures from the public and professional standards of practice.	o Must cope with teacher unions, pressures from the public and professional standards of practice.

DISJUNCTION

DISCORDANCE

CONFLICTS

Researchers promoting Domain Theory suggest that several factors are at work causing the school organization to be disjunctive and discordant:

1. Separate identities and interests
2. Differing perceptions
3. Norm differences
4. Discordance
5. Struggles for power and control
6. Listening to different drummers
7. Uncertainty

Each factor is examined briefly:

1. Separate Identities and Interests

Varying environmental demands may cause the three groups to respond in different, even incompatible ways. For example, citizens demanding lower taxes may demand budget cuts while professionals are requesting higher salaries and larger budgets in order to provide newer educational practices. As each group works under its own guiding principles, organizational structure and measures of success, they tend to separate and become disconnected from each other. They grow apart and tend to establish separate identities. It is quite natural for this to happen since they each use different principles, structures and success measures. What happens is a feeling of disjointedness, looseness--almost a lack of control. Sometimes, maybe quite often, antagonisms between groups arise because of the lack of common vision of the school district.

2. Differing Perceptions

Viewing a school district problem through the eyes of a board member often differs from what the administrator sees, and both views may be different from that of the principal. We know that perceptions of a similar event vary. What else happens is that each group selectively collects information that aids its own perception of reality while often ignoring and/or discounting information from other sources. If this process is continued, greater alienation between and among the three groups results. Tension and conflict grows. The school district begins to be torn in several directions because there are differing perceptions of reality.

3. Norm Differences

The norms of behavior differ among the three groups. Administration expects conformity with rules and procedures. The principal group prizes individuality which often threatens conformity. School board members expect that people will publicly disagree with them and are accustomed to bargaining and negotiating. Thus, behaviors acceptable to one group are unacceptable to another, separation is strengthened and the possibility of establishing close working relations is weakened.

4. Discordance

Within a school district and among the three groups, tension and conflict are almost always present. The nature of the work causes stress. The lack of harmony is heightened, however, because of the stress between the principles, measures of success, organization and the work styles of each group. The school board, aiming to establish fair and equitable treatment, is often at odds with the administration's cost efficiency and effectiveness measures. These practices, in turn, are frequently in conflict with professional standards of practice, causing frustration among principals. The representative structure of the board, the bureaucratic processes of administrations and the collegial relationships of principals do not fit neatly together. Required administrative management procedures are often at odds with human treatment processes of the profession. Neither are compatible with the board's negotiating and bargaining strategies.

5. Struggles for Power and Control

Unlike managers in business and industry, superintendents do not have the same degree of control. Principals who feel well trained demand much more autonomy and self-regulation and prize creativity. Professional association standards tend to establish regulations to govern the behavior of their members. Each group then struggles to maintain its own integrity and balance the power of the others in the school district. Teamwork often suffers. Collaborating toward a common purpose is sometimes lost to a struggle for power and control of the district.

6. Listening to Different Drummers

Each group listens and responds to different environmental factors: the school board to the political arena; the superintendent and other administrators to the technological and economic; and principals to changes in the cultural area. The demands coming from these different factors may require different, even incompatible responses. Each group strives to satisfy its own demands, resists efforts coming from the other two groups and from the outside, too. A strategy to improve one group may not necessarily be good for the other.

7. Uncertainty

A school organization faced with these factors is assured of "passing through zones of uncertainty"; where different perceptions and contrasting norms prevail, uncertainty is certain. The existence of these three disjunctive and loosely connected groups creates a situation where tasks are quite unpredictable, highly variable and often extremely difficult. Traditional problem-solving approaches tend not to work well under these conditions of uncertainty. Judgment, compromise and inspiration are more likely required. A school district must learn to cope with feelings of doubt and to manage conditions of uncertainty.

Applying Domain Theory to school district organization and examining the three domains with the factors that interact with them leads to the following proposition:

Proposition 1--Opportunity for effective governance of school districts will be increased if they are viewed as human service organizations containing the three separate domains--the School Board, the Administration, the Building Principals--each expected to play important and unique functions within the school system.

To recognize that a school district contains three domains that operate as "loosely connected" organizational units that are "somehow attached yet each retains some identity and separateness" may come as a revealing insight. However, to learn that each domain has its own unique perspectives and each tends to be in conflict with one or both of the other domains does not go far enough. Granting that each domain has work to perform that only it can do, there are still collaborative and interdependent tasks that must be performed together. There is still a need to create opportunities for people who are members of these domains to confront the stress and tension caused by

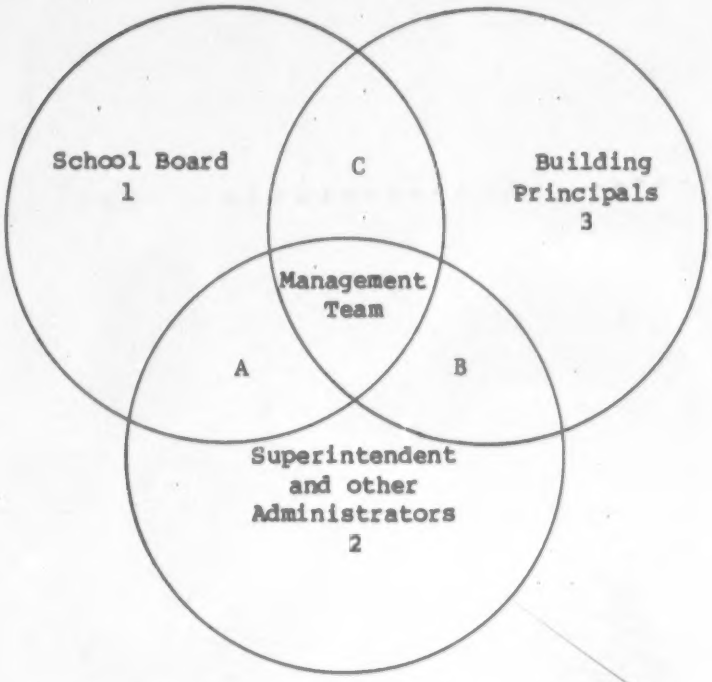
interactions of the domains and to pursue common goals and tasks. Thus, using elements from Domain Theory, we come to Proposition 2:

> Proposition 2--There is need for a districtwide communication and decision-making group to operate in which differing opinions and perceptions may be openly expressed and discussed; where the separate group identities may be communicated and understood; and where common district goals are identified and strategies developed to implement and accomplish them.

FIGURE 4

THE FOURTH DOMAIN

A Communication and Decision-Making Group--
The Educational Management Team



1 School Board has four basic functions: (a) providing for a program of quality instruction within resources, (b) providing for management and direction of school system, (c) providing for guidance through policy development, (d) providing for two-way communication between community and staff.

2 Superintendents (and other Administrators) are responsible to the school board and are accountable for the administration of the total school district program, personnel and facilities.

3 Building Principals are responsible and accountable directly to superintendent.

A The school board-superintendent relationship is the key to school district functioning. It is both formal and informal, and continuous.

B The basic relationship of principals and superintendent is administrative and professional in the routine operation of the school district. It is both formal and informal, and continuous.

C Relationships between the school board and building principals are informal and often infrequent. Purposes of contact are usually informational and/or social.

Figure 4 illustrates the relationships of the three school district groups and shows how the "fourth" domain is formed through their interactions. This Management Team Domain forms neutral ground for the three groups. It is a place where communication, inquiry and experimentation are developed and nurtured. Through their joint actions and interactions an organizational check and balance system would develop.

Each of the three domains would establish and maintain its own separate identity. Yet, the effectiveness of the school system is dependent upon the extent to which the three domains, working together, can develop shared purposes, arrive at common goals, develop trust and confidence in one another, plan and implement effective strategies and feel that they have had opportunity to influence district policies and decisions.

The management team itself would have an informal structure with few levels of authority, low division of labor and many representatives from the three domains. Procedures internally would be of a collegial nature using processes such as creative problem solving, constructive confrontation, collaboration and critique. Such an approach would provide a new communication and decision-making mechanism for the discussion and analysis of joint problems and a forum where two-way communication facilitates understanding between and among the three groups.

Information in Figure 4 also recognizes and legitimizes one-to-one relationships between:

1. The School Board and the Superintendent
2. The Superintendent and Building Principals
3. The School Board and Building Principals

While each one of these relationships is important to the overall effectiveness of the school system, the critical one is between the board and the superintendent. Unless this is clear, well understood and working, the other relationships will suffer. Of course, the way in which building principals and the superintendent relate determines much of the success of the educational program within the district. Finally, communication outside of the management team arena between the school board and building principals is usually infrequent and on an informal basis.

To recognize the Fourth Domain as a new venture and help assure its success a third proposition is called for:

Proposition 3--Members of the management team will "contract with the school system," expressing their commitment to the concept of the management team and agreeing to participate by increasing their knowledge and skill in such processes as problem solving, goal setting, decision making, conflict resolution and collaboration.

The management team concept fails unless all members understand it and have a high level of commitment toward it. Willingness to participate in any new effort is enhanced when new skills can be gained by participants. To build commitment to the management team and increase its chances for success will be measurably improved by providing opportunities to acquire new knowledge and processes for accomplishing personal and work tasks. The purpose of Proposition 3 is to offer these professional growth opportunities to its members.

In summary, this paper has proposed that:

1. It may be much more beneficial for school districts to view themselves as human service organizations than to follow business-industrial patterns of organization. By doing so, it is possible to escape from attempting to have school board members, superintendents and other administrators and building principals conform to a single organizational pattern. Rather, each group can be recognized for its unique role and contribution to the "loose-knit" system. Tension and stress growing out of these interrelationsips instead of being destructive can be seen as more of a natural outgrowth of their interactions. To deal with these and other factors a second proposal was made.

2. Because school board members, the superintendent and other administrators and building principals have separate identities, differing perceptions, norm differences, often struggle for power and live amidst uncertainties, there is a need for a "fourth domain" called a management team. This new structure would form a type of umbrella under which the three groups could openly and honestly discuss policies and problems and agree upon common goals and strategies for the school district. It would provide a neutral base or forum upon which conflicts may be resolved and differences aired without fear or antagonism. To implement the management team concept a third proposal was also made.

3. To reduce possible fears associated with this new structure a "contract with the school system" was proposed whereby all management team members would participate in a program that offered the new knowledge and skills needed to implement the management team concept. Content and timing would become an early decision of the entire group.

SCHOOL MANAGEMENT TEAMS: WHAT ARE THEY AND HOW DO THEY WORK?*

by Lloyd A. DuVall and Kenneth A. Erickson

When school people talk about team management they aren't always talking about the same thing.

Some definitions of team management deal with who comprises management teams, others deal with functions of the team, and still others define management teams by their relationship to decision making.

One definition, for instance, states that any concept of team management must have three components: ". . . the principle of supporting relationships, group problem solving and decision making methods, and high performance goals as a basis of operation."[1]

Still another definition states that a management team is ". . . a task-oriented group. . . representative of the important subsystems of the organization, which holds some organization roles in common, interacts to a formal role structure, and has a sort of reciprocal influence over one another."[2]

Given that there is no widely accepted definition of team management, we believe it important to define team management as we see it, as a group whose role is formalized and legitimized and whose purpose is problem solving and/or decision making. By this definition we are emphasizing that a management team is a formal part of an organizational structure and is legitimized by some formal policy establishing the management team. We assert that the role of the management team is problem solving and decision making in much the same way as an indivdual administrator would attack problems and make decisions.

---

*Reprinted by permission from NASSP Bulletin, May 1981. (Lloyd A. DuVall is former associate dean for the Division of Educational Policy and Management, and Kenneth A. Erickson is director, Field Training and Service Bureau, both at the University of Oregon, Eugene.)

Team Management--To What Effect?

Most organizations embark on a course of team management because of a belief that the quality of decisions made will somehow be better than those made by individuals. To determine if this purpose has or can be met by team management approaches, one must turn to the results of research and to the experiences of school districts that have used team management.

The research on the effects of team management in education is almost nonexistent. This is due to the fact that the definitional problem afflicts the study of team management as well as its operation. In addition, the positive results of team management are difficult to isolate as being directly attributable to team management. Therefore, we must turn to the research on group process, school climate, and institutional change for clues to the effects of team management.

Effects on Organizations

Using the research literature cited above, we suggest these propositions about the effects of team management on educational organizations.

Proposition One--Job satisfaction of persons participating on a management team will be higher than persons occupying similar responsibilities who function individually.

If a team functions in such a way that participants are convinced they have an effect on the decision-making process, job satisfaction will increase. Stavrianos surveyed more than 100 studies on group process and found that "there is hardly a study in the entire literature that fails to demonstrate that satisfaction is enhanced or that other generally acknowledged beneficial consequences accrue from a genuine increase in workers' decision-making power."[3]

We also suggest that the opposite is true if the management team is used as a facade to legitimize decisions previously made by one individual. That is, participant satisfaction will decrease if the role of the management team does not include genuine decision-making power.

Proposition Two--Workers (teachers) whose supervisors (principals) have influence on decisions made at the top of the organizational hierarchy will demonstrate higher job satisfaction than those whose supervisors do not have that influence.

In the private sector it has been shown that supervisors who can obtain resources for workers and who can favorably affect working conditions are seen to be better supervisors, and the workers have higher morale than with supervisors who cannot demonstrate this upward influence. We suggest that the same phenomenon also holds true in education. Principals who can attract resources for teachers and improve classroom conditions by participating on a management team where their influence is demonstrated will have teachers with higher morale and more commitment to quality education than principals without such influence.

Proposition Three--The quality of decisions recommended by a management team will be better than those made by an individual acting alone.

Groups can generate more alternative courses of action than can individuals. With a wider range of alternatives under consideration the likelihood is increased that a final decision will reflect the actual needs of an organization. In addition, the phenomenon of synergy exists in a management team decision process. That is, the total is greater than the sum of its parts. This was demonstrated by Piper, whose research showed that decisions made by a team are "not only better than the initial judgment of the decision maker but are also frequently more correct than the decision of any of the members of the group. . . ."[4]

From these propositions we conclude that participative decision making (a formalized and legitimized management team) can lead to increased teacher and principal satisfaction, high teacher morale, and more effective organizational functioning.

Management Teams—How Do They Work?

Management teams can operate in a number of ways depending on the purposes, on the personalities of individuals involved, and on the context in which they work. There are, however, three primary ways in which most teams can work— the Consensus Mode, the Centrist Mode, and the Majority Rule or Democratic Mode.

Under the Consensus Mode the team attacks a problem and wrestles with the issue until every person on the team can accept a solution. This does not mean that every person will agree that the proposed course of action is the best, but everyone must at least find it possible to live with the recommended solution. Evidence suggests that participants generally are satisfied with the Consensus Mode of operation and that the quality of decisions is high.

With the Centrist Mode the team simply provides reactions and suggestions to one decision maker. At the outset, this person must establish that he or she will retain the right and the responsibility for making the decision. The purpose of the team is to suggest alternatives, to interact with the decision maker, to look for unanticipated or unintended consequences of any proposed action. Consensus is not reached, nor is it expected. As with the Consensus Mode, evidence suggests that participants are satisfied and that the quality of decisions is high. An important requirement of this mode is that the ground rules are made clear in advance. The decision maker must satisfy the role of the management team and conduct team deliberations from the Centrist perspective.

The Democratic Mode produces less satisfaction among participants than the other two modes. While this is contrary to common beliefs about democratic administration, its shortcomings are obvious. The Democratic Mode is open for the development of political pressures among participants, the development of coalitions, and for doctrinaire attempts at persuasion. With the Democratic Mode those who vote with the majority are on the winning side and are satisfied with the decision. The net effect is that overall participant satisfaction is lower, as is the quality of the resulting decisions. The Democratic Mode represents a political rather than problem-solving perspective on issue resolution.

Team Management Models

Each organization must assess its own management characteristics, needs, and personnel before choosing a management team model.[5] No one model is compatible for all organizations. In larger organizations the team management concept may be deceptive if employees assume that everyone with administrative responsibilities will be on one management team. A multiple management team concept composed of interlocking management teams is more likely.

A conventional model of team management for smaller organizations includes teams on three levels. The "policy team" includes members of the board of education plus the superintendent of schools. The second team level consists of the superintendent, representatives of the central office and staff, and all principals in a smaller district or principal representatives in larger districts. This is known as the central management team. At the third level, management teams are composed of people who report to special area administrators such as the business manager, the curriculum director, or

the school principal. In large districts, the central leadership team may have only regional administrators as management team participants. In turn, these regional administrators would be responsible for the operation of a management team in each of their areas.

A second basic management team is the cross-bred team model. The policy level team again consists of school board members and the superintendent. The second level, or management team, has responsibility for planning, developing concepts, evaluating programs, and making recommendations to the policy team. This team consists of the superintendents and representatives of various special functions within the school district. Individuals may represent groups such as the classified team, the teaching team, the principals' team, special education, community support members, instructional support members, finance teams, and the physical facility teams. Individuals on such a management team represent major divisions of an organization. This differs from the typical superintendent's "cabinet."

A third model is "cocoon" team management. Again, the policy team consists of the board and the superintendent. The team reporting to the superintendent establishes small ad hoc teams of qualified individuals needed to study specific problems, to bring alternative recommendations with pros and cons to the management team, and to be disbanded on the team's acceptance of their report. Thus, the single-purpose cocoons (or ad hoc teams) are temporarily attached as servant groups to the management team for a specific purpose and are disbanded once their assignment is completed.

Conclusions and Cautions

We have shown that team management has the potential to be a powerful management tool. The quality of the results depends on clearly specified ground rules, sensitive application of knowledge of group process, and a willingness to open decision making to a wider group of people. We recommend a cautious approach, an approach that recognizes that team management is not a panacea.

In conclusion, let us share a list of cautions drawn from research and from the experience of administrators who have used team management in their schools.

1. It is imperative to delineate in advance which decision and policy areas remain the province of the board and top management as well as which areas are the province of each management team. Lacking this clarification, misunderstandings and disappointments concerning the performance of the management team concept are inevitable.

2. If the governing board's philosophy is not compatible with the team management concept, an administrator will find the plan difficult to establish.

3. The adoption of a team management philosophy and organization chart will not guarantee a functioning team operation. It is possible for autocracy to prevail under the guise of team management.

4. Because of individual differences some managers will have more difficulty operating on a team basis.

5. The team process is not appropriate for every decision. Administrators often are confronted by problems requiring immediate action.

6. The team process is more demanding of time and is therefore more expensive initially than non-team management styles.

7. A functioning management team is not developed over night. It takes time to develop trust and openness between team members.

8. Many management teams are too large and unwieldy to be effective.

9. The key administrator must be willing to relinquish some previously held influence and power. This is difficult for some administrators.

10. It is misleading to speak of <u>the</u> management team. Larger organizations need interlocking management teams on various management levels.

11. The management team concept will not be embraced with open arms by every employee. Individual differences suggest some are more comfortable with less involvement in the problems of leadership.

12. Team management is not the means to the easy solution of a variety of previously unsolved management problems.

Notes

1. Lynne V. Svenning, Collective Decision Making in Organizations: Operation PEP. (San Mateo, Calif.: San Mateo County School Office, 1970), p. 16.

2. Richard A. Schmuck, "Development of Management Teamwork: National Overview." Paper presented at the Educational Managers Annual Academy. Wemme, Oreg. July 1974, p. 2.

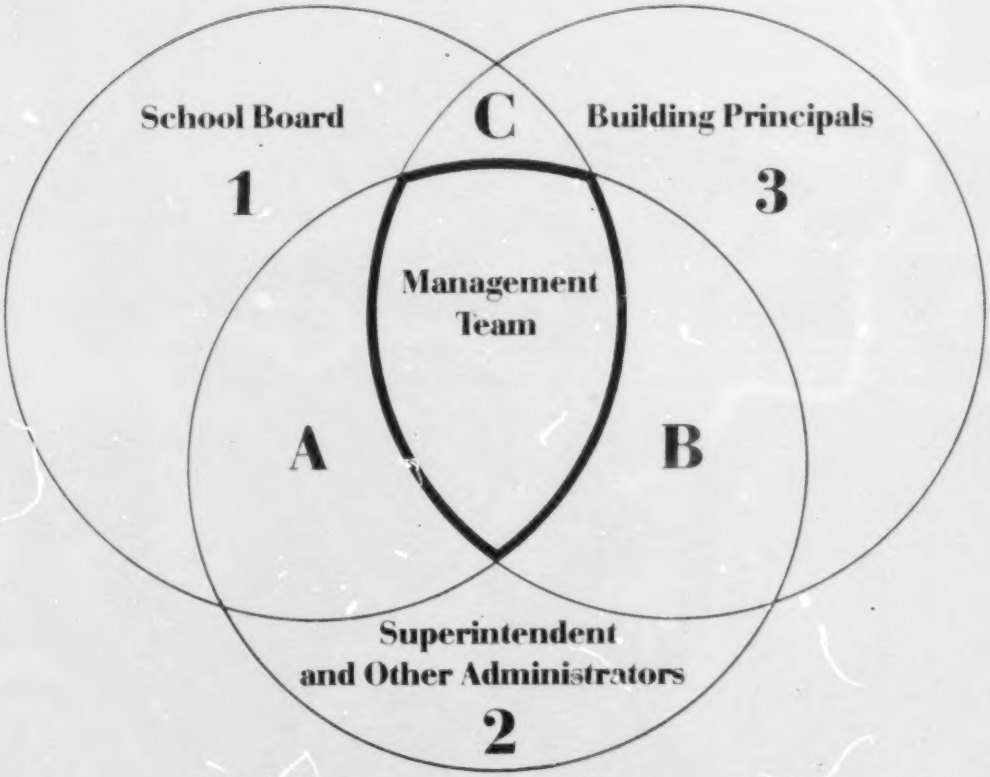
3. Leften Stavros Stavrianos, The Promise of the Coming Dark Age. (San Francisco: W. H. Freeman, 1976), pp. 59-60.

4. Donald L. Piper, "Decisionmaking: Decisions Made by Individuals vs. Those Made by Group Consensus or Group Participation," Educational Administration Quarterly, Spring 1974, p. 93.

5. For a fuller description of management team models, see: Kenneth A. Erickson and Walter H. Gmelch, School Management Teams: Their Structure, Functions, and Operations. (Arlington, Va.: Educational Research Service, Inc., 1977).

THE EDUCATIONAL MANAGEMENT TEAM

A Communication and Decision-Making Group



A Workshop

An Introduction and Orientation to the Management Team

KEYS TO SCHOOL BOARDSMANSHIP

107

This workshop is one of a series of school board inservice topics available through your state association. Others include:

- o School Board Self-Assessment
- o Conflict: Alternatives to Blowing a Fuse
- o Teamwork: The Board and Superintendent in Action
- o Policy Development
- o Program Evaluation: School Board Roles
- o Board/Administrative Staff Relations
- o Effective School Board Meetings
- o Policy is Power
- o Communicating with the Community
- o School Board Candidates Orientation
- o School Improvement: The School Board's Role
- o Building Bridges: The Politics of Boardsmanship
- o How to Initiate a Management Team/How to Evaluate a Management Team

The workshop you are presently participating in is entitled Introduction and Orientation to Team Management.

It is approximately 2 hours, 30 minutes in length and will actively involve you in a variety of exercises and materials. Should you wish to participate in additional workshops, please contact your state school board association.

WELCOME!!

You are about to participate in a school board inservice workshop entitled:

AN INTRODUCTION AND ORIENTATION TO TEAM MANAGEMENT

The purpose of this workshop is:

- To introduce the concept of team management using recent research, theory and successful practice
- To examine benefits and disadvantages of team management and show different styles of management
- Using management team models of various sized districts to:
  - Identify the present management style of your district
  - Decide how you would like your district style to be
- To understand the initial steps needed to implement team management in your own district

Two other workshops are also available on this subject:

- How to Inititate a Management Team in Your School District
- How to Evaluate an Operating Management Team

The Agenda for this workshop includes:

- Opening, local arrangements, workshop overview, warm-up activity
- A Situation: The School District Next Door
- Lecturette: What is Management? Its elements, functions, and styles
- Assumptions About Shared Decision Making
- An exercise on management models
- Types of management teams, their characteristics, benefits and problems
- Why use team management - some research and theory - A Lecturette
- Steps to implement a management team
- Analyzing forces within your own district
- An example of local school board policy
- Workshop summary and evaluation

ACTIVITY 2: SITUATION - THE SCHOOL DISTRICT NEXT DOOR

Listen for instruction from the leader.

Situation:

Three years ago the Administration gained approval from the School Board, in this suburban school district, to departmentalize educational programs in the Middle Schools. Teachers and specialists were to be used flexibly. Self-contained classrooms were to be phased out. A newly appointed and dynamic principal, together with several teachers from her building, has quietly reinstalled the self-contained classroom concept. This has been operating over one year. Some teachers in other buildings are raising questions about this variation in district practice. This principal has let it be known among the district teaching staff that she would welcome teachers from other buildings to become part of her staff if they believed strongly in the self-contained classroom concept.

At the last school board meeting a small group of parents appeared before the board. They expressed concern that their children, who were attending the self-contained school, were not receiving the same quality of instruction as offered by specialists in other Middle Schools in the district. The board was surprised by this complaint and the superintendent did not have a ready explanation.

Use this space for notes:

ACTIVITY 3: FIVE MANAGEMENT STYLES*

Model I: Superintendent-Dominated Decision Making

Model II: Superintendent-Centered Decision Making

Model III: Superintendent-Defined Decision Making

Model IV: Team-Dialogue Decision Making

Model V: Team Decision Making

---

*Adapted from Leadership & Organization: A Behavioral Science Approach. N.Y. McGraw-Hill, Inc. 1961. Robert Tannenbaum, Robert Weschler, and Fred Massaric.

ACTIVITY 4: ASSUMPTIONS ABOUT SHARED DECISION MAKING

Assumption 1: Decision making is a process.

Assumption 2: People who are immediately affected by a decision should have input in making it.

Assumption 3: People in the organization are interested in being involved in the process which leads to a decision, even though they realize that they might not actually make it.

Assumption 4: Forms of decision making other than shared decision making may be appropriate, depending on the nature, timing or crisis orientation of the situation.

Assumption 5: A critical element of shared decision making is the way in which information flows within the organization.

Assumption 6: The formal organizational structure can inhibit or enhance the flow of information.

Assumption 7: In order for an organization to fulfill its purpose of accomplishing defined objectives, decision-making responsibilities must be delegated so that certain decisions are assigned to or are made at different levels within the organization.

Assumption 8: The organizational structure for decision making must be understood and used appropriately.

Assumption 9: In order to function properly in a decision-making capacity, individuals need to possess certain skills.

Assumption 10: Possessing decision-making skills enables an individual to provide direction to the decision-making process.

Assumption 11: An awareness of personal leadership style is important to the application of decision-making skills.

Assumption 12: Consensus is a critical element of the shared, decision-making process.

---

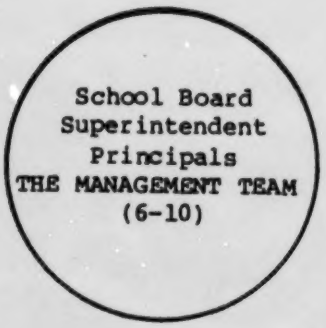
*Adapted from "Some Working Assumptions About Shared Decision Making," Don Hafeman, et al, Wisconsin School News, May 1977.

ACTIVITY 6: THE MANAGEMENT MODELS EXERCISE

OPTIONAL MANAGEMENT TEAM MODELS

1. Small District Models

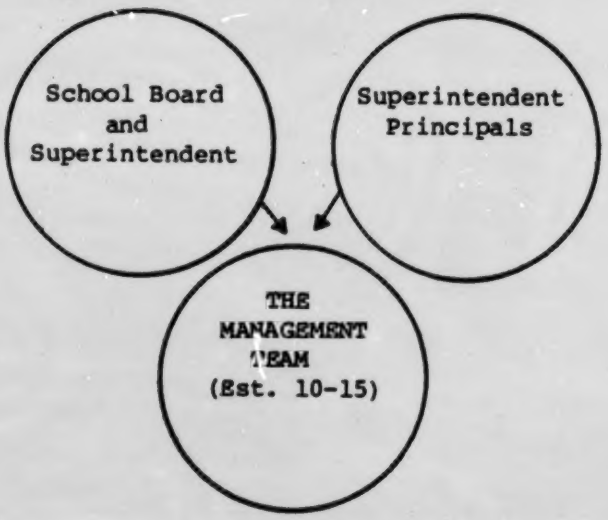
(A)



Brief Description

- Everyone meets together at all board meetings

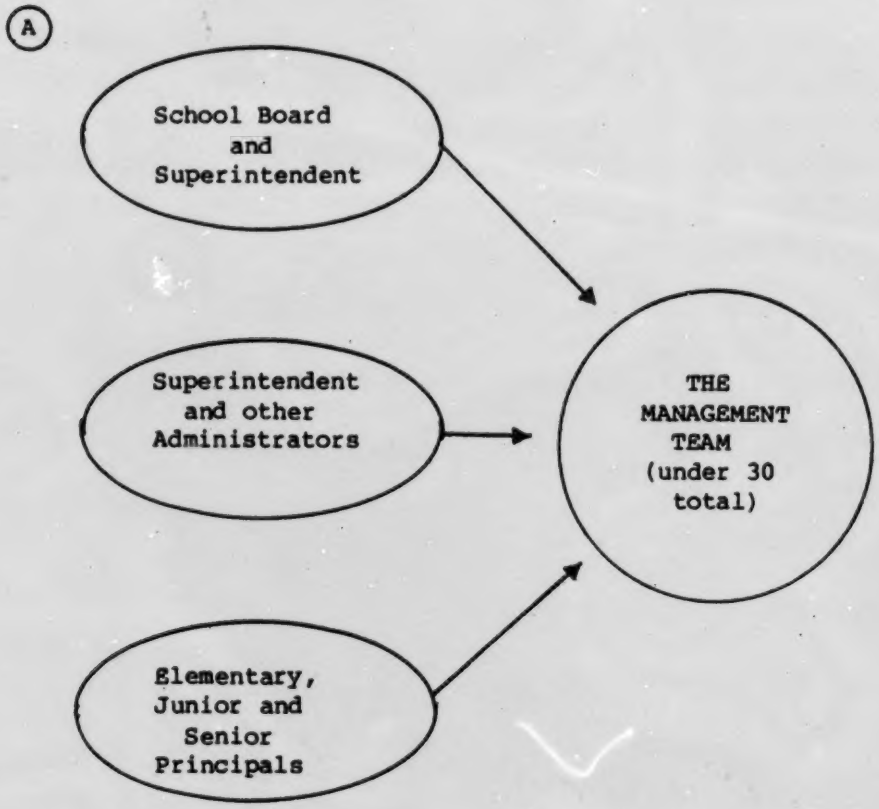
(B)



Brief Description

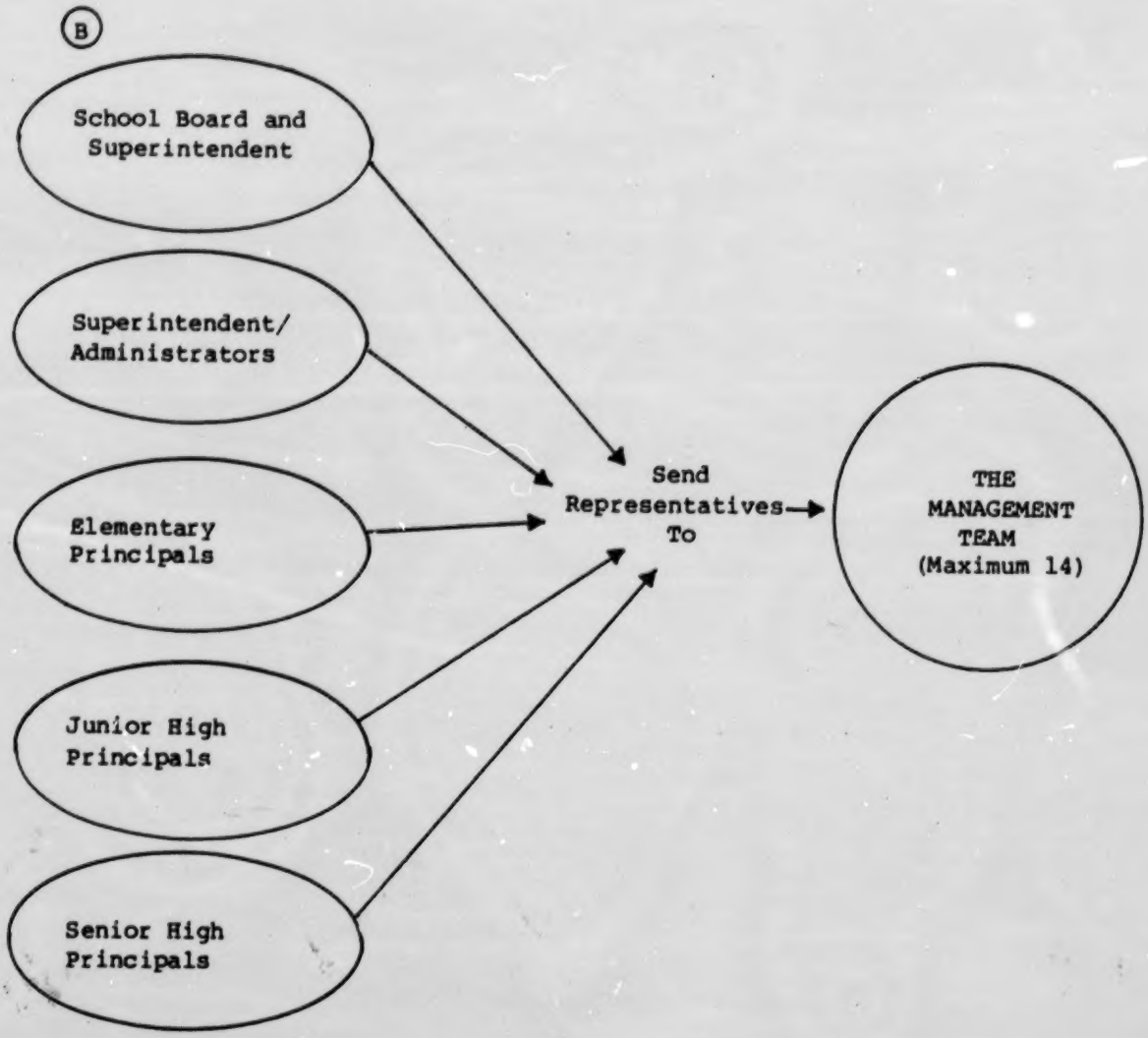
- Board and Superintendent meet together
- Superintendent and Principals meet together
- All meet together on occasion

2. Medium Sized Districts


A
School Board and Superintendent
Superintendent and other Administrators
Elementary, Junior and Senior Principals
THE MANAGEMENT TEAM (under 30 total)

Brief Description

- School board and superintendent meet
- Superintendent and district staff meet
- Principals meet together
- Superintendent and principals meet
- All meet as scheduled

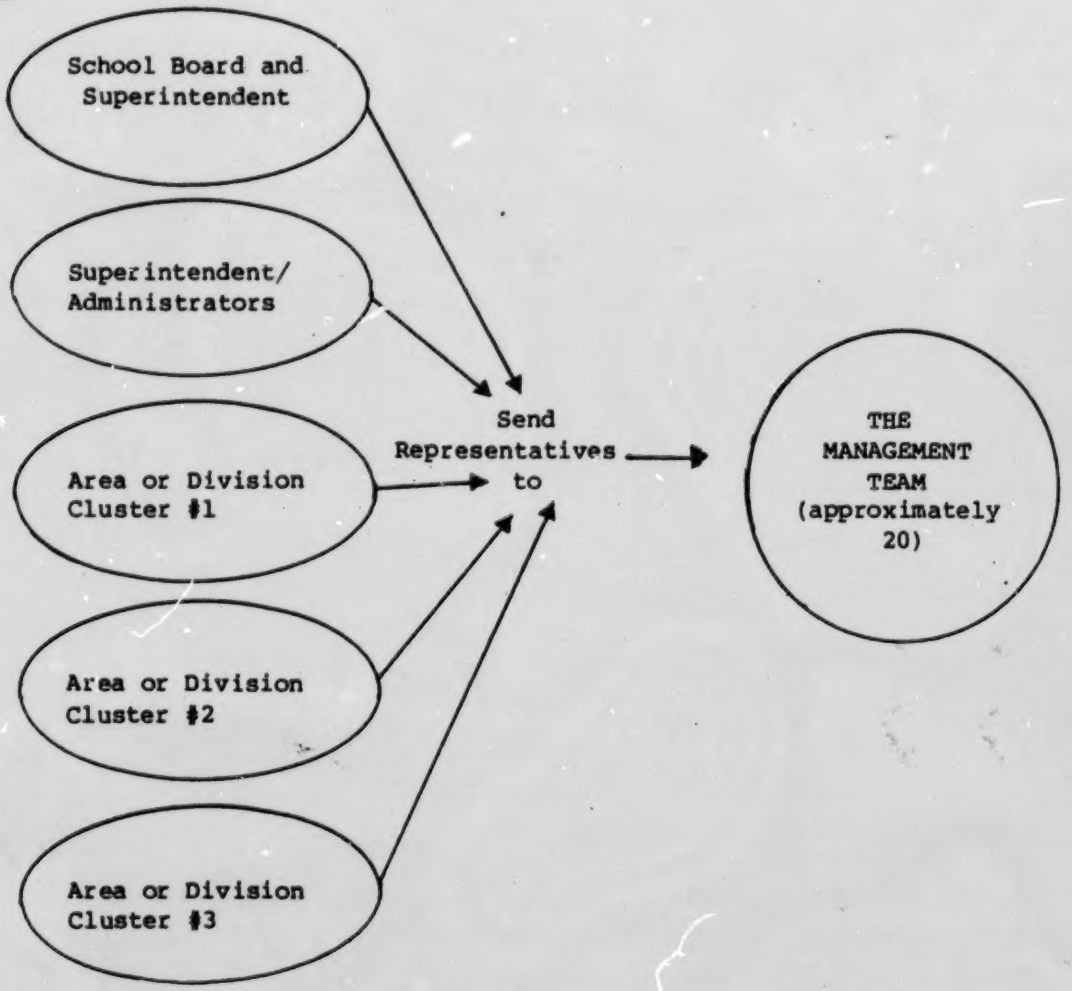


Brief Description

- Each group meets separately
- Each group sends representative to management team
- Management team meets on schedule

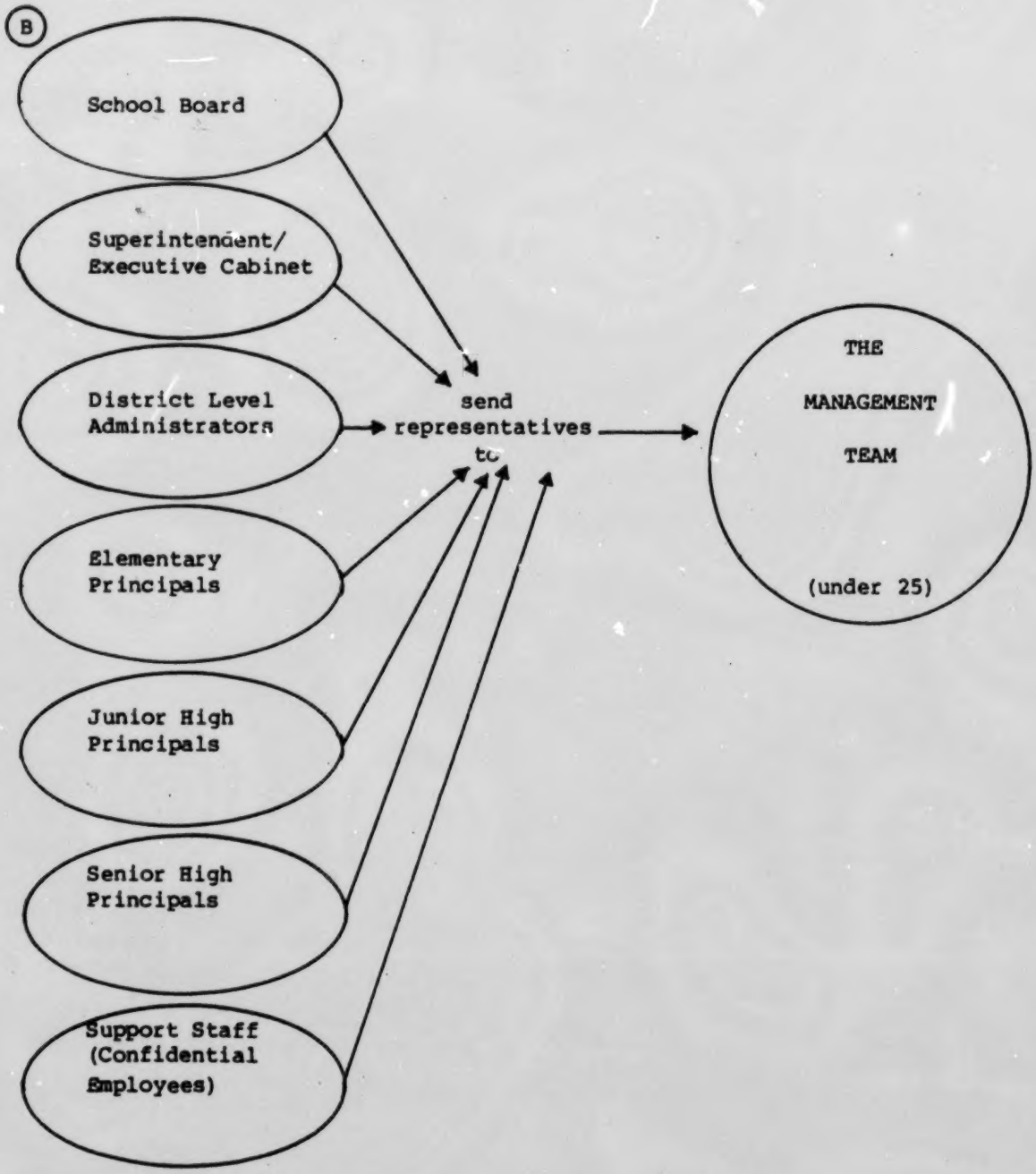
3. Large Districts

(A)


School Board and Superintendent
Superintendent/ Administrators
Area or Division Cluster #1
Area or Division Cluster #2
Area or Division Cluster #3
Send Representatives to
THE MANAGEMENT TEAM (approximately 20)

Brief Description

- Each group meets separately
- Elementary/junior high/senior high principals may meet separately and may meet as geographic clusters. Elementary/junior/senior high (feeder schools) representatives elected to meet as a management team
  Management team meets as scheduled

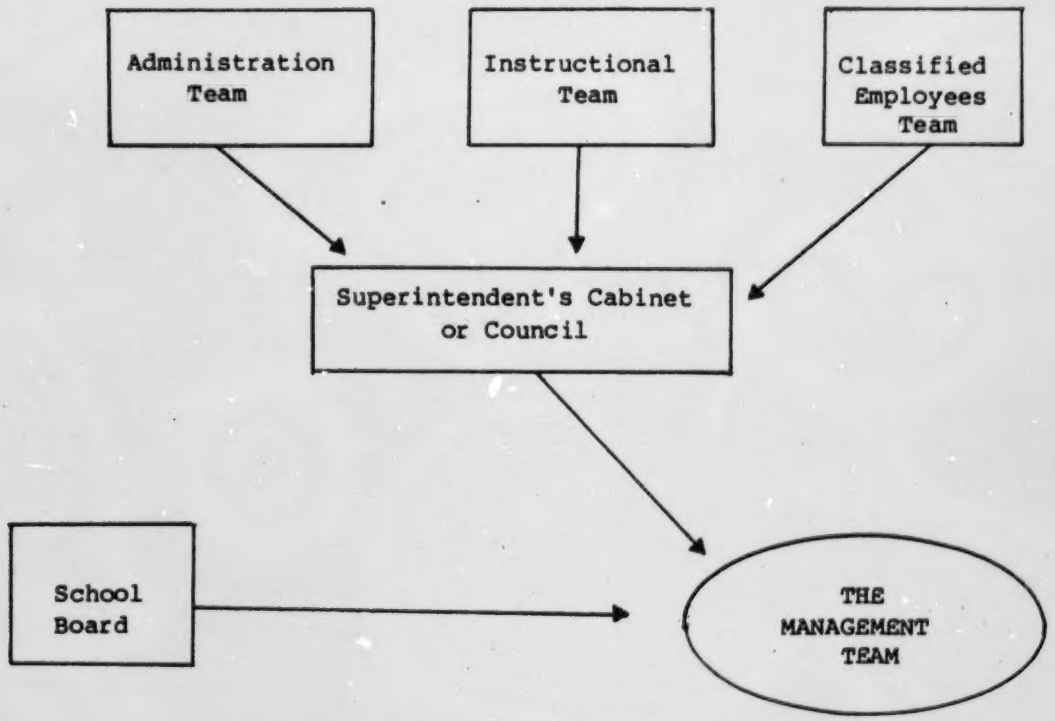


Brief Description

- All groups meet separately
- All elect representatives to management team
- Management team meets on regular schedule

- Variation: School board may not meet with management team but expect superintendent to be their representative

(c)



Brief Description

- Teams meet separately, and
- Send representatives to superintendent's cabinet/council
- Board and superintendent meet separately
- Management team meets on call with representatives from school board and the superintendent's council

Use this space to diagram your own district management model as it presently exists.

Use this space to diagram how you would like it to be.

CHARACTERISTICS OF TEAM MANAGEMENT

- Each member of the team has a clear understanding of job expectations and responsibilities.

- An effort is made to decentralize decision-making authority to the greatest extent possible.

- All management team members have an opportunity to assess the impact of policies and regulations prior to adoption.

- A system of communication provides for a regular flow of information between and among teams and team members.

- There is team participation in problem solving and goal setting.

- There is an attitude of trust and cooperation between and among team members.

- Administrators are represented on the board's negotiating team in an active or advisory capacity.

- Administrators recognize that they are management personnel and have a responsibility for representing the interests of the public and their elected representatives.

- The board of education demonstrates its belief that administrators are management personnel by guaranteeing meaningful participation, providing reasonable job security, and assuring compensation commensurate with time, responsibility, and training requirements.

- The team concept of operating the district's elementary and secondary schools has been reduced to writing and adopted as an official policy of the board of education.

- All team members are working toward common goals.

MANAGEMENT TEAM OBJECTIVES

1. To develop interpersonal and intergroup trust throughout the organization

2. To create an open, problem-solving management climate in which differences and problems are met head-on and clarified rather than "swept under the rug" or "smoothed over"

3. To place the decision-making and problem-solving responsibilities as nearly as possible to the appropriate individual with the right resources, rather than simply to a particular position

4. To maximize the "ownership" of everyone with the challenges and objectives of the school district

5. To promote mutual involvement and interdependency rather than selfish competition or subversive rivalry

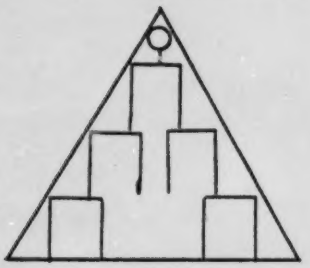
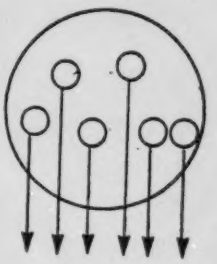
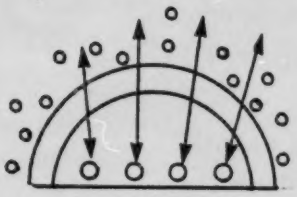
6. To be continually aware of what is happening between and to members of the team as they communicate, influence, express feelings, use leadership styles and face conflict

THE MANAGEMENT TEAM: BENEFITS AND PROBLEMS

Benefits	Problems
1. Increased worker satisfaction--motivated to be more efficient and creative--morale improves	1. Not in tune with philosophy of every district--most appropriate in districts who see themselves as service organizations
2. Improved quality of decision making	2. Shared decision making takes time and requires a wide range of skills
3. Keeps policy making at the lowest administrative level--people who identify problem are the ones who will solve it	3. Much time spent on trivial things unless care is taken in planning
4. Exploits individual talents and strengths to reach wise decisions	4. Communication becomes fragmented when several teams or groups are used
5. Increased input from all of district gives better understanding of needs, problems and how solutions are working	5. Feedback is needed and not always available on performance, meetings in progress, interactions of groups, etc.
6. Inputs from minority groups can increase effectiveness of district planning and goals	6. Ability to give and receive trust varies--some people are left vulnerable because they were open and trusting
7. Provides opportunity for more people to become more involved in planning and implementation--a sense of ownership established	7. Competent personnel are needed who are equipped with needed skills... problem solving, conflict, decision making
8. Increases feeling of local control	8. In general, requires greater investment of time, money and effort for decision making
9. Chances increase that decisions made will be implemented fully	9. Clear role definition required for superintendent, principals and board
10. Sets example of democratic principles for district and community	10. Role changes for superintendent, principals and boards are contrary to community expectations--(strong leader)
	11. Short cutting decision making process by superintendent/board
	12. Lack of inservice training in new skill development

DOMAIN THEORY*

THE THREE DOMAINS OF SCHOOL ORGANIZATION

POLICY	ADMINISTRATION	SERVICE
The Electorate		
		
School Board	Superintendent/Administrators	Building Principals
o Elected to represent the people and perform by the consent of the governed.	o Employed by the board to carry out its policies.	o Employed by board to exercise professional judgment in serving students.
o Work together by voting, bargaining and negotiating.	o Uses vertical control and coordination techniques that are bureaucratic and impersonal like MBO and PPBS.	o Relationships are collegial; service is highly individualized/personal.
o Interested in equality, justice and impartiality.	o Interested in cost efficiency and program effectiveness.	o Autonomy, self-regulation and creativity govern their work.
o Operate in a political arena with the public courts, legislatures and state departments of education.	o Conformity is often a goal of management.	o Problem solving used as an important tool. o Respond to cultural demands within the community.
o Must cope with teacher unions, pressures from the public and professional standards of practice.	o Must cope with teacher unions, pressures from the public and professional standards of practice.	o Must cope with teacher unions, pressures from the public and professional standards of practice.

DISJUNCTION

↓

DISCORDANCE

↓

CONFLICTS

Kouzes and Mico promoting Domain Theory suggest that several factors are at work causing the school organization to be disjunctive and discordant:

1. Separate Identities and Interests

   Varying environmental demands may cause the three groups to respond in different, even incompatible ways. For example, citizens demanding lower taxes may demand budget cuts while professionals are requesting higher salaries and larger budgets in order to provide newer educational practices. As each group works under its own guiding principles, organizational structure and measures of success, they tend to separate and become disconnected from each other. They grow apart and tend to establish separate identities. It is quite natural for this to happen since they each use different principles, structures and success measures. What happens is a feeling of disjointedness, looseness--almost a lack of control. Sometimes, maybe quite often, antagonisms between groups arise because of the lack of common vision of the school district.

2. Differing Perceptions

   Viewing a school district problem through the eyes of a board member often differs with what the administrator sees, and both views may be different from that of the principal. We know that perceptions of a similar event vary. What else happens is that each group selectively collects information that aids its own perception of reality while often ignoring and/or discounting information from other sources. If this process is continued, greater alienation between and among the three groups results. Tension and conflict grows. The school district begins to be torn in several directions because there are differing perceptions of reality.

3. Norm Differences

   The norms of behavior differ among the three groups. Administration expects conformity with rules and procedures. The principal group prizes individuality which often threatens conformity. School board members expect that people will publicly disagree with them and are accustomed to bargaining and negotiating. Thus, behaviors acceptable to one group are unacceptable to another, separation is strengthened and the possibility of establishing close working relations is weakened.

4. Discordance

   Within a school district and among the three groups, tension and conflict are almost always present. The nature of the work causes stress. The lack of harmony is heightened, however, because of the stress between the principles, measures of success, organization and the work styles of each group. The school board, aiming to establish fair and equitable treatment, is often at odds with the administration's cost efficiency and effectiveness measures. These practices, in turn, are frequently in conflict with professional standards of practice, causing frustration

among principals. The representative structure of the board, the bureaucratic processes of administrations and the collegial relationships of principals do not fit neatly together. Required administrative management procedures are often at odds with human treatment processes of the profession. Neither are compatible with the board's negotiating and bargaining strategies.

5. Struggles for Power and Control

Unlike managers in business and industry, superintendents do not have the same degree of control. Principals, who feel well trained, demand much more autonomy and self-regulation and prize creativity. Professional association standards tend to establish regulations to govern the behavior of their members. Each group then struggles to maintain its own integrity and balance the power of the others in the school district. Teamwork often suffers. Collaborating toward a common purpose is sometimes lost to a struggle for power and control of the district.

6. Listening to Different Drummers

Each group listens and responds to different environmental factors: the school board to the political arena; the superintendent and other administrators to the technological and economic; and principals to changes in the cultural area. The demands coming from these different factors may require different, even incompatible responses. Each group strives to satisfy its own demands, resists efforts coming from the other two groups and from the outside, too. A strategy to improve one group may not necessarily be good for the other.

7. Uncertainty

A school organization faced with these factors is assured of "passing through zones of uncertainty"; where different perceptions and contrasting norms prevail, uncertainty is certain. The existence of these three disjunctive and loosely connected groups creates a situation where tasks are quite unpredictable, highly variable and often extremely difficult. Traditional problem-solving approaches tend not to work well under these conditions of uncertainty. Judgment, compromise and inspiration are more likely required. A school district must learn to cope with feelings of doubt and to manage conditions of uncertainty.

---

*Excerpts and rewording of material prepared by James M. Kouzes and Paul R. Mico entitled "Domain Theory: An Introduction to Organizational Behavior in Human Service Organizations," Journal of Applied Behavioral Sciences, Vol. 15, No. 4, 1979, pp. 456-464.

SAMPLE POLICY

ADMINISTRATION

Management Team

The board recognizes the importance of maintaining an effective management team to strengthen the administration and educational programs of the district and to establish and improve communications, decision making, conflict resolution, and other relationships among the members of the team. The management team provides a means whereby educational policies and administrative procedures that define the district's programs and operations are arrived at through shared responsibility and authority.

While the management team concept places emphasis upon shared responsibility and authority, nothing in this policy is intended to limit the responsibility and authority of the board ultimately to make decisions.

The management team is composed of the superintendent and administrative, supervisory and administrative support staff who have significant responsibilities for formulating district policies or administering district programs, and in addition, direct and supervise other employees.

The district's management team shall provide input into policies which directly affect management staff in the administration of the school district by

a. assisting in the development of the educational goals and objectives of the district;

b. applying available knowledge to the improvement of district services;

c. providing input into the development of district and department financial plans and budgets;

d. providing input into the labor relations policies and practices of the district;

e. evaluating proposals made by other employees and making recommendations on the district's response; and

f. serving as a forum to review any problems facing the district.

The superintendent shall prepare administrative guidelines for the operation of the management team. Such guidelines shall provide that management team meetings will include representatives reflective of management staff and, on occasion, all such staff members. The management team shall address itself to appropriate concerns identified by the superintendent and appropriate concerns identified by any member of the team.

The management team will meet twice a month and shall be on call with the board or representatives thereof. When appropriate, an agenda will be distributed before the meeting.

MANAGEMENT TEAM "CONTRACT AGREEMENT"

Provisions in this agreement outline the purpose of the management team in this district and serve as a guideline for its operation.

Policy: The school board acknowledges the importance for the establishment of a management team to effectively manage and operate the school district. However, the school board retains its legal responsibility and authority to make final decisions.

Purpose: The management team in this district is a group of individuals who agree to work cooperatively together to improve the educational opportunities and services for all students and the organizational and leadership climate of the district.

Membership: All members of the school board, administration and building principals are considered eligible for management team membership.

Function: Fostering two-way communication and opportunity to influence decision making among and between the three management team groups is seen as the primary function performed by the management team.

Operation:

1. As a member of the management team, I understand my role and authority, accept responsibility for it, will work within the established communication channels of the management team and will support the decisions made by it.

2. In order for the management team concept to be successful I recognize the need for gaining new knowledge and skills and agree to participate in scheduled workshops or seminars sponsored by the district for this purpose.

3. I will commit my time and energy to the successful implementation of the management team.

_____

(signed) Management Team Member

Date _____

ACTIVITY 10: FORCE-FIELD ANALYSIS EXERCISE

Statement: What forces are presently operating in your district that would help or hinder adopting the management team concept?

Forces For +	Forces Against -

MANAGEMENT TEAM WORKSHOP EVALUATION

Check one:
_____ School board member
_____ Administrator

Your frank answers to these questions will help us improve this workshop. Please be candid.

1. General Rating: Please mark two (2) things on the scale below to indicate:

   A Your expectation of the workshop when you arrived

   B Your feeling about the workshop after participating in it

1	2	3	4	5	6	7
Very Poor			Average			Very Good

2. The objectives of the workshop were:

   _____a. Very clear to me

   _____b. Somewhat clear to me

   _____c. A mystery to me

   Comments: _____

3. In my view, the workshop presenter(s) were:

   a. Knowledge of topic
      _____Extremely knowledgeable
      _____Knowledgeable
      _____Not knowledgeable

   b. Preparation
      _____Well Prepared
      _____In need of more preparation
      _____Poorly prepared

   c. Helpfulness
      _____Very helpful
      _____Somewhat helpful
      _____Not helpful

4. What I liked most about the workshop was _____

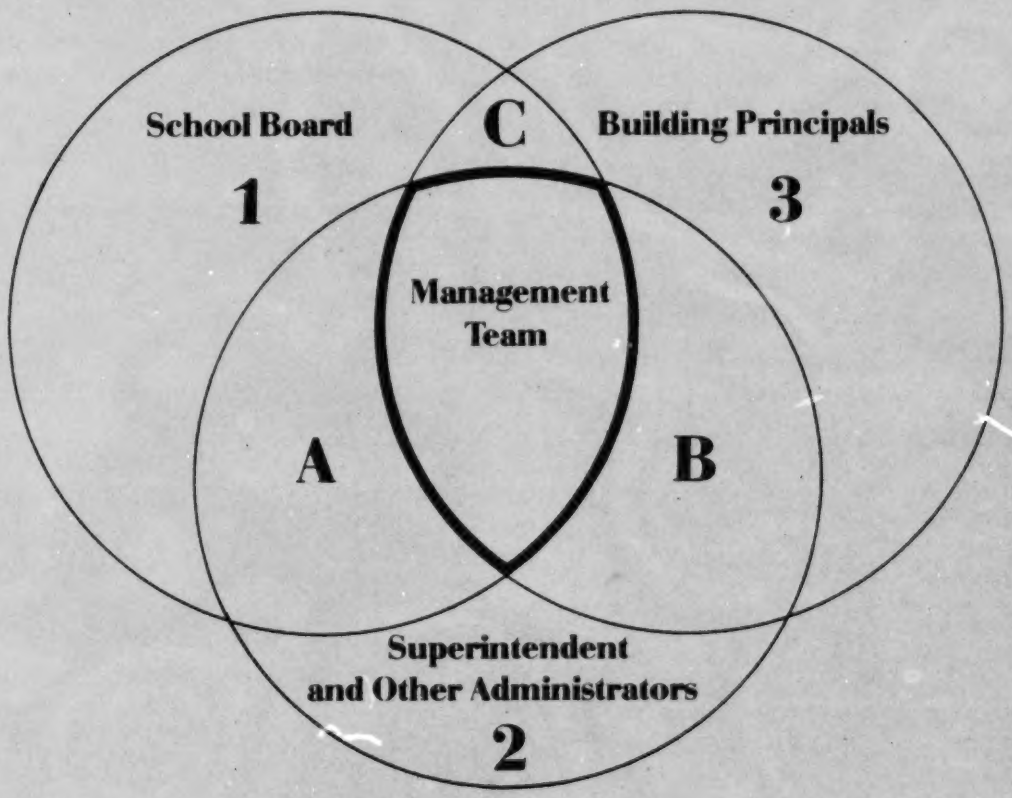
   Least liked _____

5. Suggestions, ideas or comments to improve the workshop: _____

130

THE EDUCATIONAL MANAGEMENT TEAM

A Communication and Decision-Making Group



A Workshop
How to Initiate a Management Team

KEYS TO SCHOOL BOARDSMANSHIP

WHY MANAGEMENT TEAMS SUCCEED OR FAIL

Forces For (+)	Forces Against (-)

HOW TO INITIATE A MANAGEMENT TEAM IN YOUR DISTRICT

This is one of the three-part series of workshops on team management and is for the purpose of assisting a specific school district in starting one. Others in the series include an introductory and orientation workshop and another to assist in evaluating the performance of an operating management team.

Outcomes of this two-day workshop are:

- A management plan
- School board goals for the management team
- Role expectations for each participating group
- A statement of purpose
- A team managment model
- A role renegotiating process
- A set of working agreements
- Topics to be addressed and an agenda for the first meeting
- Signs of success for judging progress
- A list of future training needs

WELCOME TO THE WORKSHOP!

MANAGEMENT TEAM WORKSHOP 2

Agenda

DAY 1

9:00	o	Opening, Arrangements, Introduction
9:10	o	Warm Up Activity, Transparencies, Force-Field
9:25	o	Agenda Preview/Purpose/Objectives/Outcomes
9:30	o	Futures Exercise
10:45	o	Break
11:00	o	Role of Management Team and Groups
12:00 noon		Lunch
1:15	o	Role Expectations of Management Team Groups
2:15	o	Break
2:30	o	Role Negotiations Exercise

DAY 2

9:00	o	Management Team Organization and Operation
9:30	o	Clarifying Decision Making
10:15	o	Break
10:30	o	Management Team Role Play
12:00 noon		Lunch
1:15	o	Conclude Role Play
2:30	o	Workshop Summary, Evaluation and Adjournment
3:00	o	Adjourn

WARM-UP ACTIVITY: Describe what you think "ideal" transportation will be like in 1990.

What Characteristics?	Fill in some Details
1.	
2.	
3.	

Jot down notes here that describe your "ideal" management team. Project yourself into the future and describe what you see, using present tense verbs to show it is happening now: "People are acting like...," "The management team is...," etc.

Barriers that Stand in the Way of Realizing the Future

1.

2.

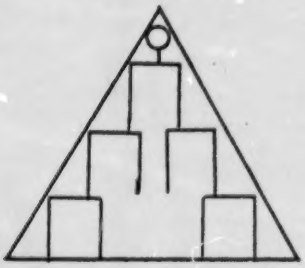
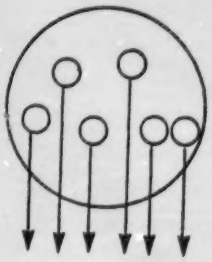
3.

4.

5.

DOMAIN THEORY*

THE THREE DOMAINS OF SCHOOL ORGANIZATION

POLICY	ADMINISTRATION	SERVICE
The Electorate		
School Board	Superintendent/Administrators	Building Principals
o Elected to represent the people and perform by the consent of the governed.	o Employed by the board to carry out its policies.	o Employed by board to exercise professional judgment in serving students.
o Work together by voting, bargaining and negotiating.	o Uses vertical control and coordination techniques that are bureaucratic and impersonal like MBO and PPBS.	o Relationships are collegial; service is highly individualized/personal.
o Interested in equality, justice and impartiality.	o Interested in cost efficiency and program effectiveness.	o Autonomy, self-regulation and creativity govern their work.
o Operate in a political arena with the public courts, legislatures and state departments of education.	o Conformity is often a goal of management.	o Problem solving used as an important tool. o Respond to cultural demands within the community.
o Must cope with teacher unions, pressures from the public and professional standards of practice.	o Must cope with teacher unions, pressures from the public and professional standards of practice.	o Must cope with teacher unions, pressures from the public and professional standards of practice.

↓

DISJUNCTION

↓

DISCORDANCE

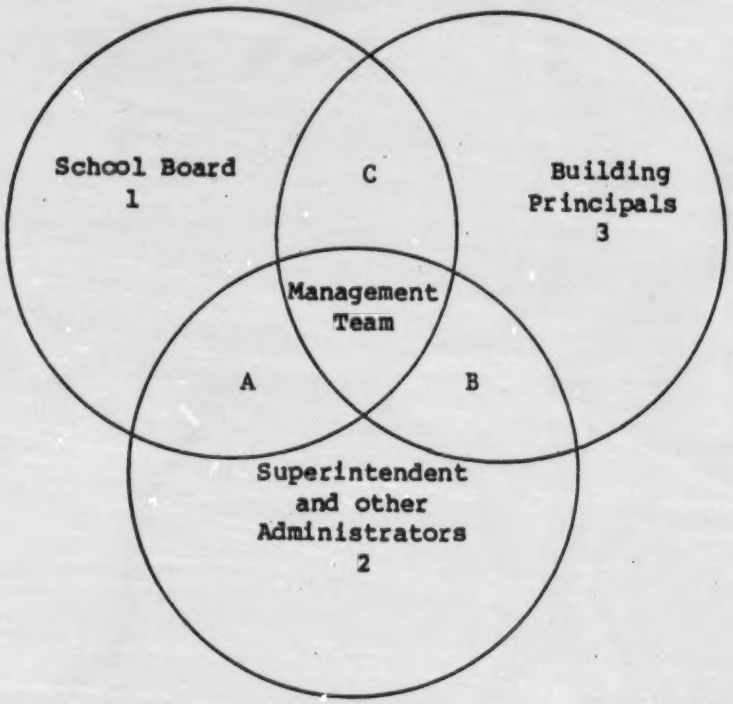
↓

CONFLICTS

Factors at Work

1. Separate Identities and Interests
2. Differing Perceptions
3. Norm Differences
4. Discordance
5. Struggles for Power and Control
6. Listening to Different Drummers
7. Uncertainty

THE EDUCATIONAL MANAGEMENT TEAM
A Communication and Decision-Making Group



1 School Board has four basic functions: (a) providing for a program of quality instruction within resources, (b) providing for management and direction of school system, (c) providing for guidance through policy development, (d) providing for two-way communication between community and staff.

2 Superintendents (and other Administrators) are responsible to the school board and are accountable for the administration of the total school district program, personnel and facilities.

3 Building Principals are responsible and accountable directly to superintendent.

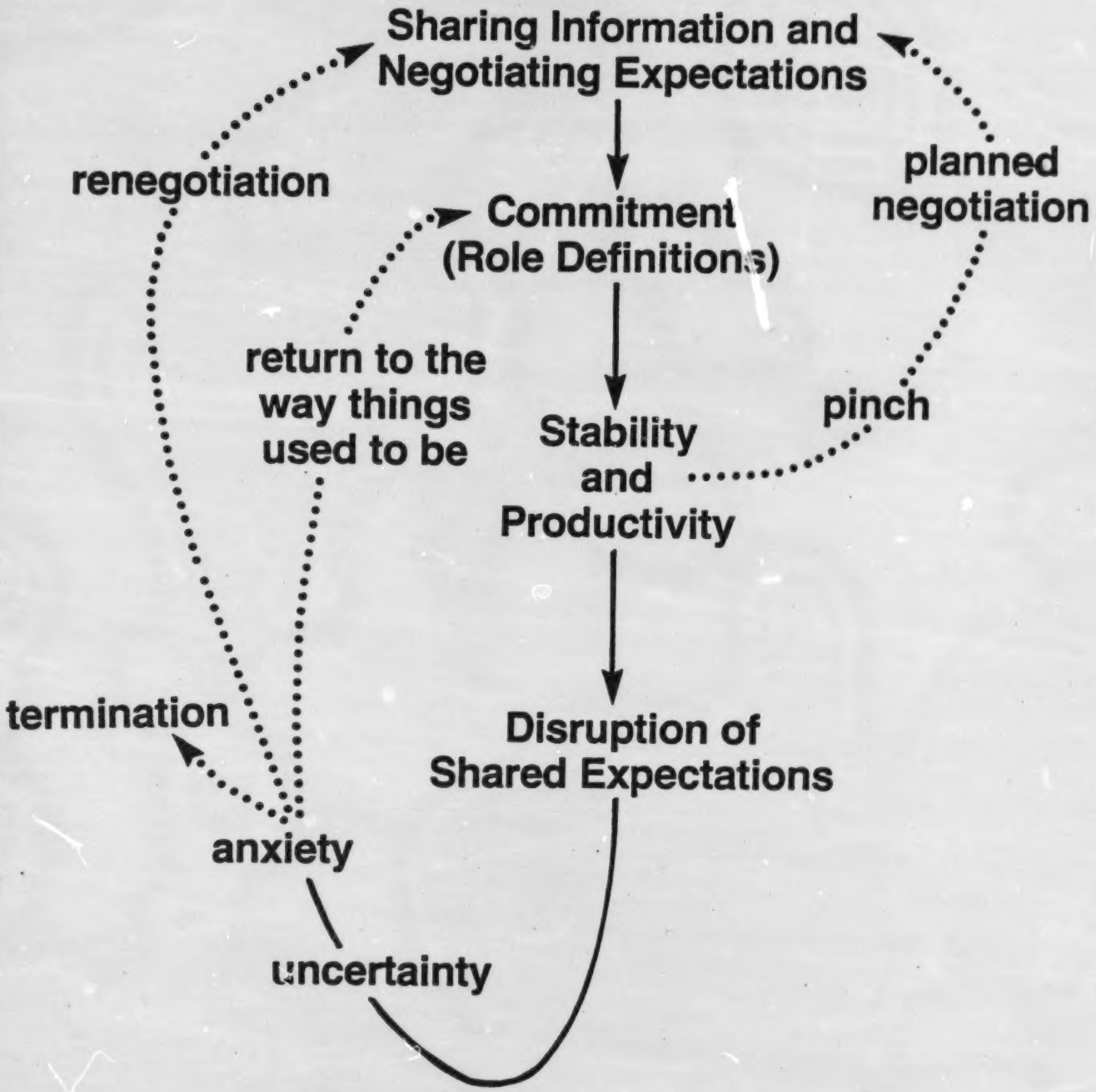
A The school board-superintendent relationship is the key to school district functioning. It is both formal and informal, and continuous.

B The basic relationship of principals and superintendent is administrative and professional in the routine operation of the school district. It is both formal and informal, and continuous.

C Relationships between the school board and building principals are informal and usually infrequent. Purposes of contact are usually informational and/or social.

Management team consists of all three groups or their representatives who meet on schedule for purposes that have been agreed upon.

Planned Renegotiation*



*John J. Sherwood and John C. Glidewell, Paper No. 338, November 1971, Purdue University, Lafayette, Indiana.

(a) My expectations of the management team are

(b) My expectations for my own group are

(c) The expectations I have for other groups are

_____Group:

(d) The expectations I have for other groups are

_____Group:

(e) The expectations I have for other groups are

_____Group:

ROLE NEGOTIATION EXERCISE STEP 1: ISSUE DIAGNOSIS*

Messages from _____ to _____
group group

1. If your group were to do the following things more or better it would help us to increase our effectiveness.

_____

_____

_____

_____

_____

2. If your group were to do the following things less (or not at all), it would help us to increase our effectiveness.

_____

_____

_____

_____

_____

3. The following things which your group has been doing help to increase our effectiveness and we hope you will continue to do them.

_____

_____

_____

_____

_____

*Adapted from Roger Harrison. Role Negotiation: A Tough Minded Approach to Team Development. Social Technology of Organization Development, pp. 84-95, 1972.

ROLE NEGOTIATION EXERCISE STEP 2: SUMMARY

Summary of messages to_____ from_____
group group

More or Better	Less or Stop	Continue as Now

ROLE NEGOTIATION EXERCISE STEP 3: WRITTEN AGREEMENTS

Final written agreements between _____ and _____
group group

More or Better:

Less or Stop:

Continue as Now:

Diagram on this page how you think the management team in your district should be organized:

TECHNIQUES TO CLARIFY DECISION MAKING

At times, organizational trends toward dispersed influence can be overdone. In some schools, the democratic spirit can get carried to the extreme point at which everyone expects virtually all decisions, no matter how trivial, to be made consensually. As the dispersion of influence increases throughout a district, it is very important to agree upon those people who have power with regard to specific classes of decisions. That is to say that a person's power with regard to a decision varies with the type of issue. The important point is that everyone agrees on how the decision should be made. It is obvious that some decisions should not be made consensually.

One technique useful for clarifying organizational decision-making is the decision-making matrix. The columns of the matrix represent different jobs or status levels in the district, such as principals, school board members and superintendent/central administration. The rows of the matrix represent subtasks about which decisions are to be made. Management team members complete the matrix by discussing the appropriate kinds of influence for each cell of the matrix, i.e., the appropriate sort of power each column-group should wield over each row-task.

MANAGEMENT TEAM DECISION MAKING MATRIX*

	School Board	Supt. and Central Adm.	Building Principals	Management Team	Others
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Instructions: For each decision listed (left above) determine the kind of influence (below) each group (top) should exercise. Place the appropriate letter (I, C, P, V or A) in the spaces provided.

Label

Blank May recommend or suggest. In a healthy organization, it should be understood that any person may make recommendations to the person who can authorize action. Because this is assumed for all positions, including positions from which other kinds of influence can be exerted, we enter no special symbol for recommending and suggesting.

I Must be informed. "I" means the position needs to know the result of a decision so that appropriate coordinating action can be taken. The "I" usually shows that a position will be affected by a decision, or that the person in the position will have to implement the decision.

C Must be consulted. The position must be given opportunity to influence the process of arriving at a decision by presenting information, demonstration, or proof. An occupant with "C" power should be consulted early enough in the process that information from him can make a genuine difference in the final decision.

P Must participate. "P" means that occupants of a position must take part in making the decision. This means that at least a majority vote of all those with a "P" is necessary before the decision is final.

V Veto power. "V" means that persons in the position have veto power over the function. This means that agreement must be obtained from all those with "V" before the decision can be made.

A Authority to make decision. "A" represents the greatest power of all. A person or group with "A" power can make the decision and others must go along with it.

*Based on material by John Wallen, Northwest Regional Educational Laboratory

	Mgmt. Team	Board	Supt.	Princ.	Central Adm.	Other
District Goals						
Develop Policies						
Implement Policies						
Evaluate Curriculum						
Order Textbooks						
Employ Teachers						
Transfer Teachers						
Hire Administrators						
Transfer Administrators						

R Recommend (all may)

I Informed

C Consulted

P Participate

V Veto

A Authority

Situations for Team Management

1. The district has adopted a new curriculum in one subject matter area. The teachers in one building have convinced their principal that they can provide a better program for their students by using their own curriculum.

   The principal brings this problem to the management team. Should the teachers be allowed to use their own curriculum?

2. The basic philosophy of the district is to organize instruction in the primary and intermediate schools making use of self-contained classrooms. The exception is the use of specialists to provide planning time. The principal of an intermediate school believes that he can make better use of the specialties of his staff by organizing the building on a semi-departmentalized basis.

   The principal brings this problem to the management team. Should he be permitted to organize the building on a semi-departmentalized basis?

3. A high school principal, the vocational director and director of personnel have interviewed three finalists for a business education teaching position. The three administrators can't agree on the finalist. What is the next step?

4. A tentative decision has been made to implement the occupational versatility program in the district's middle schools. Several principals see other priorities. How or should the conflict be resolved by the management team?

5. The superintendent receives word from the state department of education mid-year that non-employee related costs must be reduced by 30 percent for the current year. The superintendent recommends that supply purchases and travel be eliminated for the remainder of the year. Several members of the team disagree. How will this be resolved?

6. A tentative decision has been made to change from 16mm to VHS 1/2". Several principals object. Whose responsibility is it to make the decision?

7. There is an opening in school "A" and a teacher from school "B" desires the position. Principal "A" would like to have the teacher from school "B." Who makes the decision to approve or deny the transfer?

8. Special education teachers are frequently moved without consultation with the sending or receiving schools, or the director of personnel. Who should be consulted in these teacher reassignments and have final approval of the moves?

9. An employee (either certificated or classified) is having some difficulty in his/her present assignment. The director of personnel believes he/she would be successful in another position. Who should be involved in the discussions related to a potential reassignment?

10. Who determines summer hours for central office staff and/or building personnel?

MANAGEMENT TEAM MEETING: ROLE PLAY

- Chairman calls meeting to order
- Purpose of Meeting: To continue to develop needed elements for the implementation of a management team in our district.
- Agenda:
  1. Develop a statement of purpose for the management team
  2. Propose a list of agenda topics and suggest the frequency of meetings.
  3. What will be the decision making procedures used by the management team?
  4. Develop a proposed School Board Policy Statement re: management team.
  5. List the items that would compose a set of group agreements on how you would expect the group to act and operate.
  6. Propose a letter of agreement (form) to be signed by management team participants.
  7. List "signs of success" that will be used to assess management team operation and progress.
  8. Identify training needs that may be needed to assure success for the management team.
- Summary of agreements and actions to be taken. What remains?
- Meeting feedback: Were there ways we could have improved our meeting? If so, what are they?
- Conclude meeting and adjourn.

MANAGEMENT TEAM WORKSHOP 2--EVALUATION

1. General Workshop Rating: Mark two (2) things on the scale below to indicate with an

   A your expectation of the workshop when you arrived, and a

   B to indicate your feeling about the workshop after participating in it.

1	2	3	4	5	6	7
Very Poor			Average			Very Good

2. Workshop Activities

Please estimate the value to you of each workshop activity. Choose a number from the scale (below) to show its worth to you and write it in the space following the activity name. Please add comments if you wish.

1	2	3	4	5	6	7
Worthless			Some Help			Very Beneficial

Activity	Rating	Comments
a. Futures Exercise	____	_____
b. Change Model (Sherwood &b Glidewell)	____	_____
c. Role Expectations (Group expectations)	____	_____
d. Role Negotiations (Roger Harrison's technique	____	_____
e. Management Team Organization (Management Team design, etc.)	____	_____
f. Clarifying Decision Making (In Basket exercise)	____	_____
g. Management Team Meeting: Role Play	____	_____

(Over)

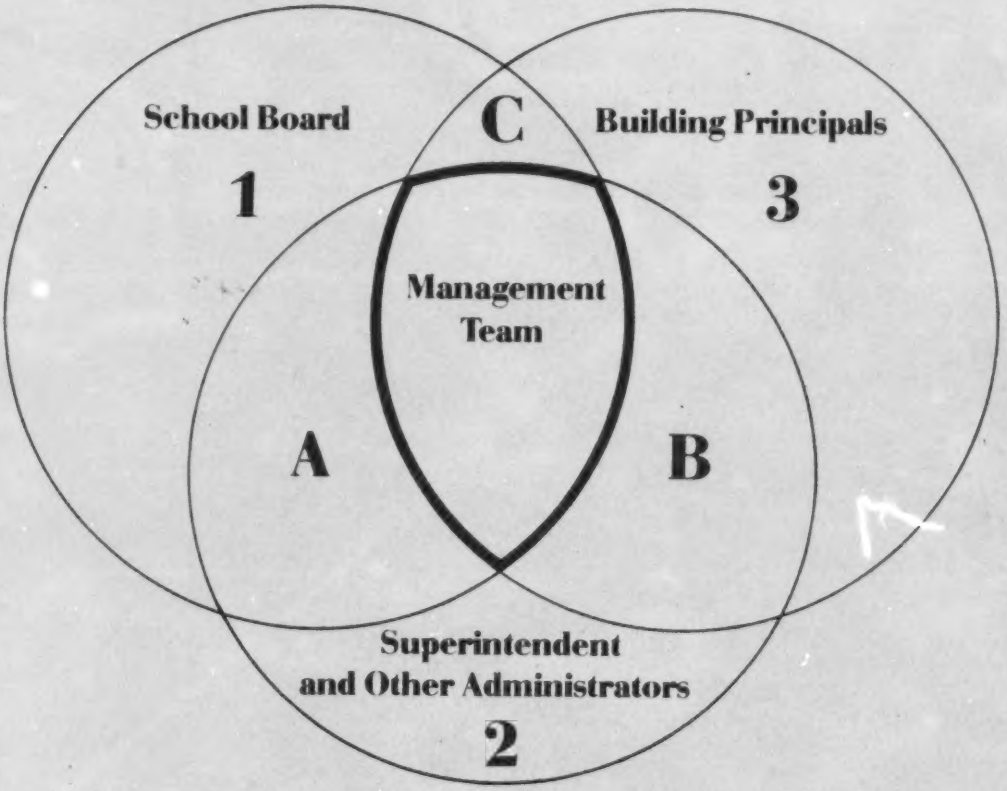
3. Workshop Leadership:

1	2	3	4	5	6	7
Poor Leader			Average Leader			Skillful Leader

4. Suggestions, ideas or comments to improve the workshop:

THE EDUCATIONAL MANAGEMENT TEAM

A Communication and Decision-Making Group



A Workshop

How to Evaluate a Management Team in Operation

KEYS TO SCHOOL BOARDSMANSHIP

EVALUATING THE MANAGEMENT TEAM

PARTICIPANT BOOKLET

Enclosed you will find a survey form that has been selected for the assessment of the management team in your district. All members of the management team are being requested to complete this survey. Please follow directions carefully in completing it and return to the designated place on or before the specified date. Thank you.

A. USING THE MANAGEMENT TEAM DISTRICT-LEVEL APPRAISAL FORM

This is the pilot version of a project sponsored cooperatively by the Washington State School Directors' Association, the Washingon Association of School Administrators and the Association of Washington School Principals. It is being carried out in response to a mandate from leaders representing these organizations. The consensus is that the effectiveness of school management can be improved by strengthening the management team at the local level. The validity of this concept has been demonstrated not only by the successes of the statewide school management team coalition, but also by districts that have adopted the concept at the local level.

The purpose of the appraisal is to develop mutual understanding of others' perceptions and concerns and to determine what changes if any should be considered. The intent is not to criticize or place blame, but rather to take a realistic look at what those on the management team may view as needed improvements.

Some clarifications

This appraisal form has been developed from recommendations offered by various representatives of the management team groups. Also helpful were forms that have been used in other states. Some suggestions have been offered that a few clarifications would be appropriate. Included under The School Board are references to input from district-level administrators, principals and other supervisory personnel; it should be understood, of course, that such input should be provided in cooperation with--not bypassing--the superintendent. It has been suggested that Part B should also include deputy, associate and district superintendents, who really are arms of the chief administrator. Some items may not apply in certain districts; the recommendation has been made that check marks under "Don't know" could also mean "Not applicable."

Finally, it should be emphasized that the assistance of a representative WSSDA-WASA-AWSP resource team be called in to evaluate the appraisal form responses, which should be used only as the basis for developing recommendations for strengthening and improving the management team.

MAKING the MANAGEMENT TEAM CONCEPT WORK:

District-Level Appraisal

Check one:

- ☐ Board member
- ☐ District-level administrator
- ☐ Dept., project or building administrator

EXPLANATION: This is more than an evaluation form. It is designed as the means of ***improvement*** as well as ***appraisal.*** It's not enough to ask "How are we doing?" The more important question to answer is "What do we do about it?" The comprehensive checklist section, and other resources available, can help provide the answers.

SUGGESTIONS FOR USING THIS FORM:

- Provide copies of this form to board members and ***all*** administrative and supervisory personnel. (Category only to be indicated at top of first page.)
- Compile and synthesize responses (preferably with the assistance of a WSSDA-WASA-AWSP resource team.)
- Provide opportunity for thorough and open discussion involving all members of the local management team.
- With the assistance of the resource team, determine priorities and develop an implementation plan.
- Make provision for continued dialogue, reappraisal and modification of plans.

NOTE: Additional resource materials and/or assistance with special problems will be provided by WSSDA, WASA or AWSP on request.

PART I - DETERMINING STRENGTHS AND WEAKNESSES:

Rating (Check below the number you think best indicates the condition in your school district.

Area of Assessment	Exceptional	Good	Fair	Poor	Not at all	Don't know
	1	2	3	4	5	?
A. THE SCHOOL BOARD:						
1. Generally reflects confidence in the administrative staff.						
2. Has a good working relationship with the superintendent.						
3. Relies upon other district-level administrators for counsel.						
4. Encourages input from building principals and assistant principals.						
5. Involves administrators in bargaining with other employees.						
6. Encourages input from other supervisory personnel.						
7. Makes provision for regular systematic reports from all areas.						
8. Provides opportunity for open two-way discussions.						
9. Involves administrative staff prior to making decisions of concern to them.						
10. Follows effective self-evaluation procedures.						

B. THE SUPERINTENDENT:

	Exceptional 1	Good 2	Fair 3	Poor 4	Not at all 5	Don't know ?
1. Has the confidence and respect of the board.						
2. Has a good working relationship with top-level central administrators.						
3. Has a good working relationship with all district-level administrators.						
4. Has a good working relationship with principals and assistant principals.						
5. Holds regularly scheduled meetings with administrative personnel.						
6. Provides opportunity in advance for administrators to suggest agenda items to be discussed.						
7. Provides opportunity for individual administrators to discuss concerns on a one-to-one basis.						
8. Keeps administrators informed of relevant information through frequent memos and bulletins.						
9. Relies on administrators' advice before making recommendations to the board relative to policies or programs.						
10. Effectively fulfills superintendent's responsibilities in evaluating staff.						

C. DISTRICT-LEVEL ADMINISTRATORS (other than superintendents)

	Exceptional 1	Good 2	Fair 3	Poor 4	Not at all 5	Don't know ?
1. All have well-defined job descriptions.						
2. Have clearly defined table of organization, showing assignment and line of responsibilities.						
3. Have authority to carry out duties without undue influence from others.						
4. Are encouraged to offer new ideas and to make recommendations for improvement.						
5. Have the respect and cooperation of staff members responsible to them.						
6. Have a good working relationship with each other, reflecting trust, cooperation and good communication.						
7. Follow effective procedures for reporting plans and progress for respective areas of responsibility.						
8. Regularly attend board meetings and make appropriate contributions prior to board decisions.						
9. Have effective procedures for evaluation, self-improvement and resolving concerns, including salary determination.						
10. Are directly or indirectly involved in negotiations with other employee groups.						

D. PRINCIPALS AND ASSISTANT PRINCIPALS:

	Exceptional	Good	Fair	Poor	Not at all	Don't know
	1	2	3	4	5	?
1. Generally consider themselves as members of the management team.						
2. Protect confidential information shared with them.						
3. Have the authority necessary to carry out their duties.						
4. Enjoy the respect and cooperation of teachers.						
5. Cooperate and communicate with each other, district-wide.						
6. Work effectively with district-level personnel.						
7. Have effective, systematic procedures for reaching group consensus and taking appropriate action.						
8. Participate in negotiations with nonsupervisory personnel, directly or indirectly.						
9. Have effective procedures for evaluation, self-improvement and resolving concerns, including salary determination.						
10. Have established plan clearly spelling out their management responsibilities in the event of a strike or other emergency.						

CHECKLIST OF AREAS OF POSSIBLE IMPROVEMENT

Item	Problem or Weakness	Action Indicated
☐ ***Assignment*** of administrators		
☐ ***Authority*** (administrators)		
☐ ***Benefits*** (administrators)		
☐ ***Board-administrator*** relations		
☐ ***Budget*** development		
☐ ***Classified*** personnel		
☐ ***Contract*** administration: (employee groups)		
☐ ***Contracts:*** (administrators', individual)		
☐ ***Communications***		

(continued)

CHECKLIST OF AREAS OF POSSIBLE IMPROVEMENT

Item	Problem or Weakness	Action Indicated
☐ ***Evaluation*** of administrators		
☐ ***Evaluation of board***		
☐ ***Evaluation*** of superintendent		
☐ ***Hiring*** practices		
☐ ***Inservice*** programs		
☐ ***Job*** descriptions		
☐ ***Meetings*** (administrators)		
☐ ***Meetings*** (board)		
☐ ***Negotiations*** (administrator groups)		
☐ ***Negotiations*** with teachers		
☐ ***Policy development***		
☐ ***Public Relations***		
☐ ***Recognition*** of administrators		
☐ ***Reporting*** procedures		
☐ ***Salaries*** (administrators')		
☐ ***Strike*** procedures		
☐ ***Superintendent:*** relations with other administrators		
☐ ***Support services***		
OTHER:		

Education Management Team

A JOINTLY SPONSORED SERVICE OF THE MANAGEMENT TEAM

ASSOCIATION OF WASHINGTON SCHOOL PRINCIPALS
WASHINGTON ASSOCIATION OF SCHOOL ADMINISTRATORS
WASHINGTON STATE SCHOOL DIRECTORS ASSOCIATION

8

For additional information or assistance, contact the Olympia office of any of these three associations.

B. MANAGEMENT TEAM EVALUATION FORM*

Below are listed several characteristics of an effective management team. As you read each one think about the management team in your district in two ways:

A. How much is there NOW?
B. How much do you WISH there were?

Rating Scale:

1	2	3	4	5	6	7
Low Minimum			Average			High Maximum

Instructions:

For each item rate the statement using the scale above. There are NO right or wrong answers. For example:

	How Much NOW?	I WISH it Were?
How rewarding is it to be a management team member?	____	____
1. Working conditions are familiar and relaxed. (Members feel comfortable about making suggestions without fear of embarrassment, punishment or disapproval.)	____	____
2. There is receptivity to innovation and change. (There is a search for improved methods and a supportive climate for achieving objectives.)	____	____
3. Maximum contribution of each member is encouraged. (Individual strengths are built upon and opportunities provided for personal and professional renewal.)	____	____
4. Active participation of all members in decision making is provided for. (There is active involvement of the team in processes of problem definition, generation of alternatives and selection of a solution.)	____	____

*Adapted from R. Likert: "Characteristics of an Effective Management Team."

	How Much NOW?	I WISH it Were?
5. Members' values and goals are used. (Full discussions of all proposals and ideas draw upon the best wisdom the group has to offer.)	____	____
6. Confidence in group ideas is developing. (Goals established are achieved into expected results.)	____	____
7. There is open communication. (Each person on the Team has equality of access to each other's ideas and information.)	____	____
8. There is creative use of conflict. (Divergent thinking is seen as constructive as long as interpersonal problems are not getting in the way.)	____	____

RELATED TRANSPARENCIES

What is Management?

Management is ...

- Getting things done through people
- Decision making
- A process of organizing and employing resources to accomplish objectives
- Creating an environment that helps people accomplish objectives
- And more ...

MT

Management Elements:

- Developing realistic and challenging objectives
- Working with people
- Obtaining material resources
- Achieving coordination of the above
- Providing leadership

Management Functions: POSIE

- **Planning**
  Needs, goals, strategies, resources

- **Organizing**
  Identifying work to be done to meet objectives and coordinating it

- **Staffing**
  Selecting and developing staff needed for high quality performance

- **Implementing**
  Doing the day-to-day activities required to meet objectives and helping others with theirs

- **Evaluating**
  Assessing how well objectives are being met and making changes needed to do so

MT

Management Styles

Model I - Superintendent-Dominated Decision Making

Model II - Superintendent-Centered Decision Making

Model III - Superintendent-Defined Decision Making

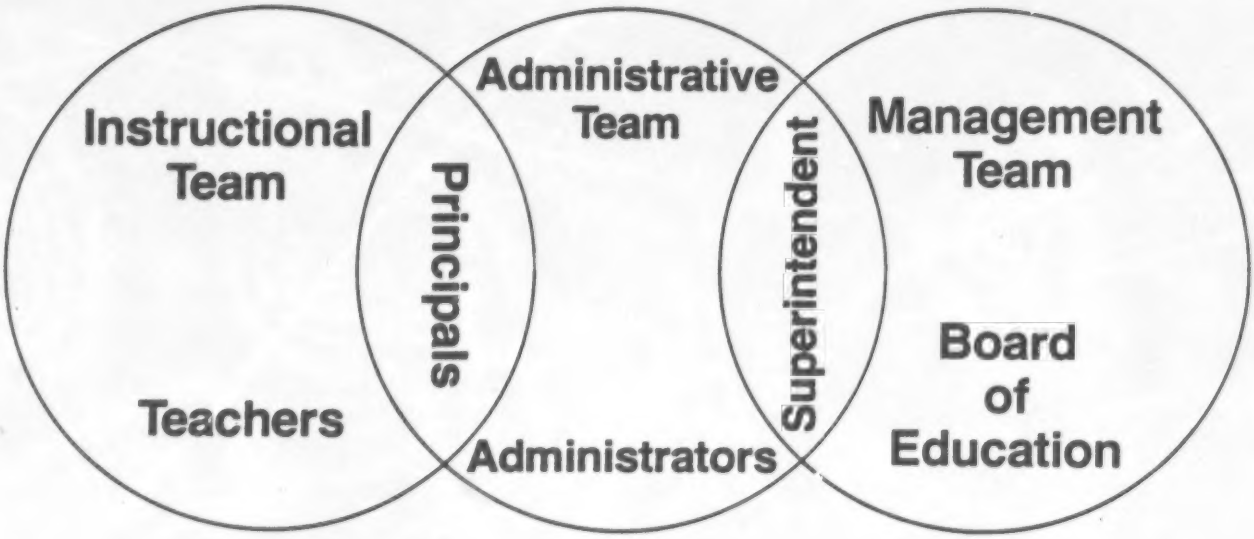
Model IV - Team-Dialogue Decision Making

Model V - Team Decision Making

Team Leadership Works When:

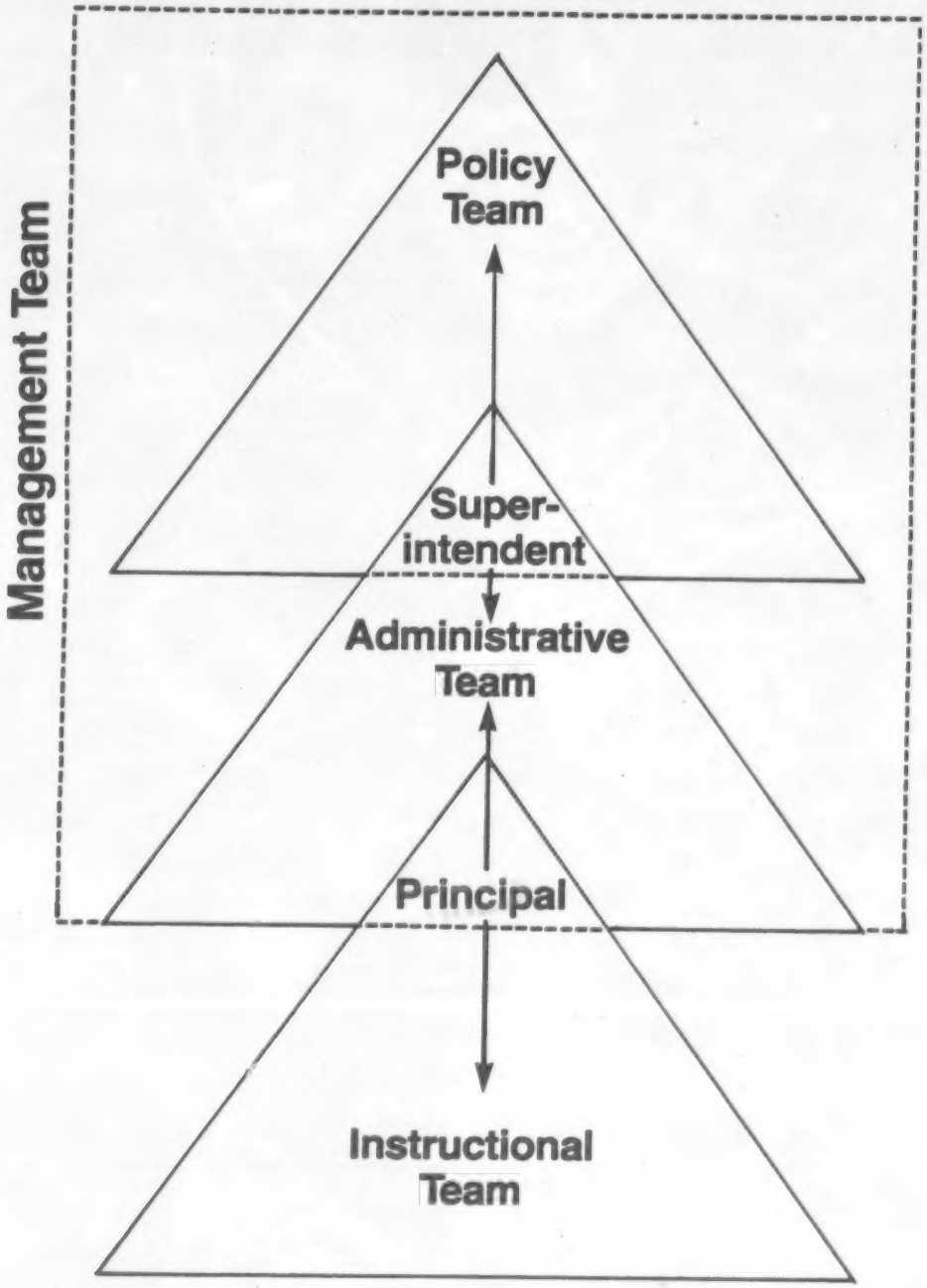
- There is a high need and capacity for freedom and independence
- There is readiness for the responsibility of tough decision making
- Participants are problem solvers—not mere identifiers or reporters of problems
- Members identify with the goals of the system

A


Instructional Team
Teachers
Principals
Administrative Team
Administrators
Superintendent
Management Team
Board of Education

B

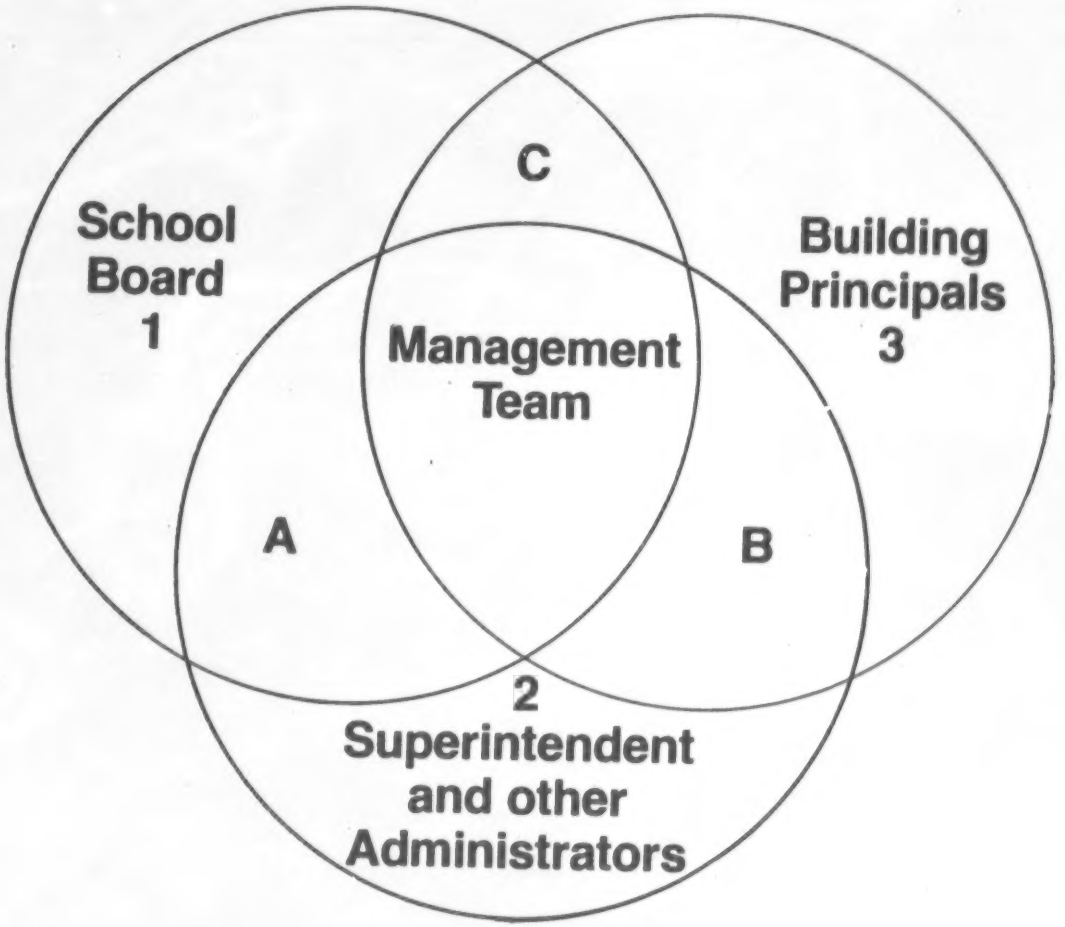
Three Teams Connected Through Linking Pins



C

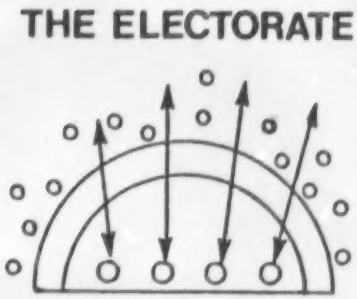
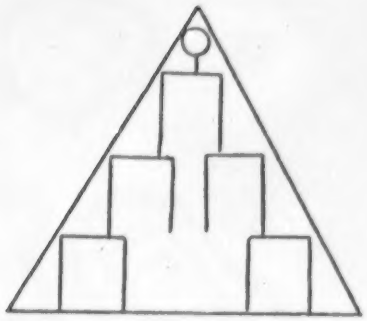
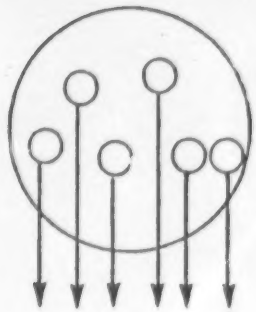
The Educational Management Team

A Communication and Decision-Making Group



MT

The Three Domains of School Organization

Policy	Administration	Service
		
School Board	Superintendent/ Administration	Building Principals

Factors at Work

1. Separate Identities and Interests
2. Differing Perceptions
3. Norm Differences
4. Discordance
5. Struggles for Power and Control
6. Listening to Different Drummers
7. Uncertainty

MT 8B

MANAGEMENT TEAM STEPS

1. Obtain agreement on management team concept

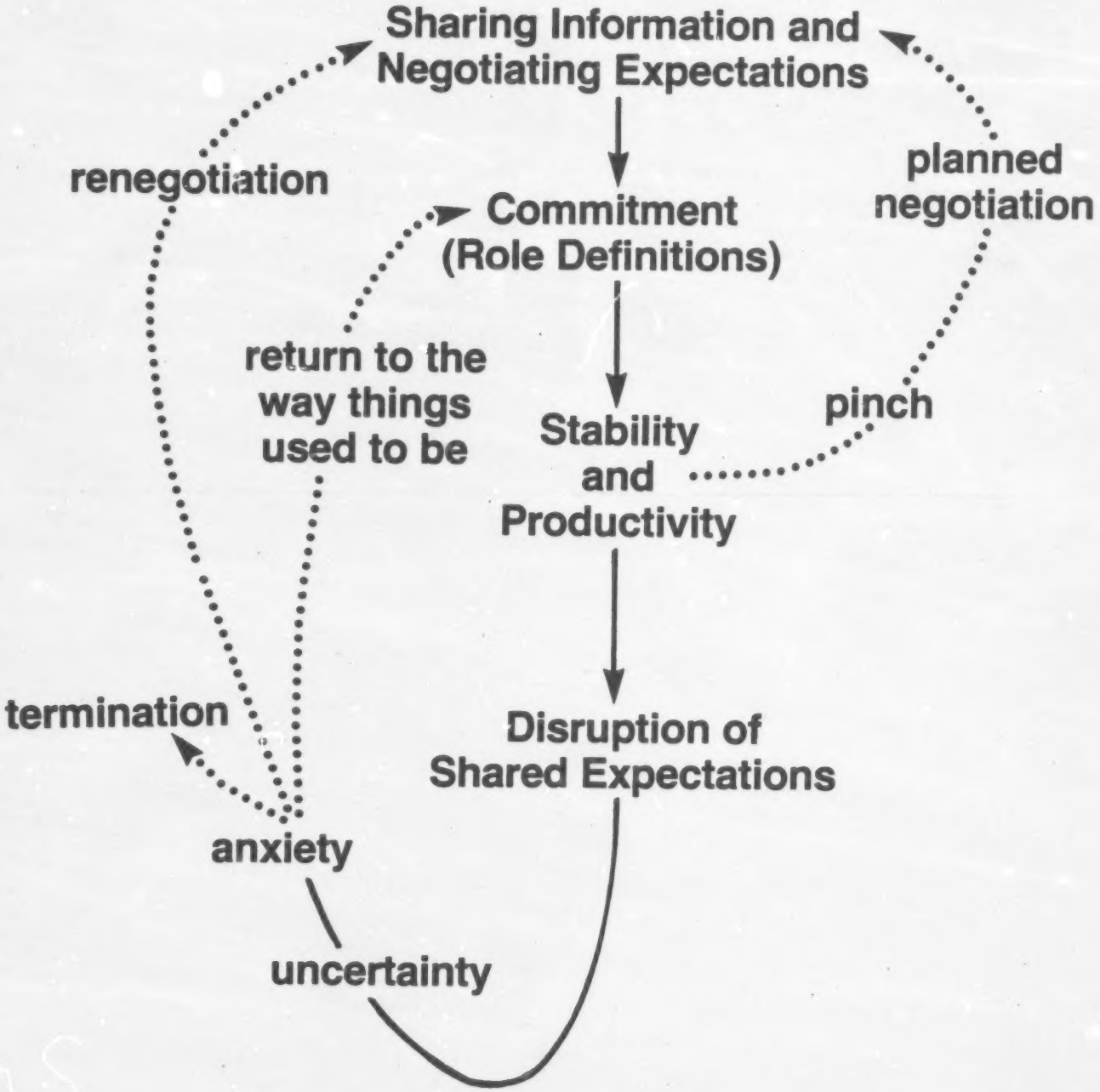
2. School board adopts a policy

3. Involve potential members in planning

4. Agree on the plan

5. First management team meeting

Planned Renegotiation*



*John J. Sherwood and John C. Glidewell, Paper No. 338, November 1971, Purdue University, Lafayette, Indiana.

MT 10

Definitions of Roles

Role Expectations:

What others think the person/group is responsible for and how it should be done

Role Conception:

What the person/group thinks the job is

Role Acceptance:

What the person/group is willing to do

Role Behavior:

What the person/group actually does